



Charter Application
DECEMBER 1, 2015

I. Charter School Information

1. Name of proposed charter school: **Leadership Academy of Utah**

2. Name of applicant: **Leadership Academy of Utah**

3. Authorized agent: **Busch Jones**

4. Mailing address: **3230 S. Timeron Dr. West Valley City, UT 84128**

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7. District(s) where proposed charter school is located: **Statewide**

8. District contact(s) and date complete application submitted to district(s). (NOTE: repeat this statement for each district in which the school may be located.)

Submitted to Samuel Jarman (person) who works at Alpine School District on 12-1-15 (date).
 Submitted to Ray Terry (person) who works at Beaver School District on 12-1-15 (date).
 Submitted to Ronald Tolman (person) who works at Box Elder School District on 12-1-15 (date).
 Submitted to Steven Norton (person) who works at Cache School District on 12-1-15 (date).
 Submitted to James Briscoe (person) who works at Canyons School District on 12-1-15 (date).
 Submitted to Steven Carlsen (person) who works at Carbon School District on 12-1-15 (date).
 Submitted to Bruce Northcott (person) who works at Daggett School District on 12-1-15 (date).
 Submitted to Bryan Bowles (person) who works at Davis School District on 12-1-15 (date).
 Submitted to Davis Brotherson (person) who works at Duchesne School District on 12-1-15 (date).
 Submitted to Kirk Sitterud (person) who works at Emery School District on 12-1-15 (date).
 Submitted to Ben Dalton (person) who works at Garfield School District on 12-1-15 (date).
 Submitted to Scott Crane (person) who works at Grand County School District on 12-1-15 (date).
 (continued)
 Submitted to Martin Bates (person) who works at Granite School District on 12-1-15 (date).
 Submitted to Shannon Dulaney (person) who works at Iron County School District on 12-1-15 (date).
 Submitted to Patrice Johnson (person) who works at Jordan School District on 12-1-15 (date).
 Submitted to Rick Robins (person) who works at Juab School District on 12-1-15 (date).
 Submitted to Robert Johnson (person) who works at Kane School District on 12-1-15 (date).
 Submitted to Frank Schofield (person) who works at Logan School District on 12-1-15 (date).
 Submitted to David Styler (person) who works at Millard School District on 12-1-15 (date).
 Submitted to Douglas Jacobs (person) who works at Morgan School District on 12-1-15 (date).
 Submitted to Steven Hirase (person) who works at Murray School District on 12-1-15 (date).
 Submitted to Rick Nielson (person) who works at Nebo School District on 12-1-15 (date).
 Submitted to Samuel Ray (person) who works at North Sanpete School District on 12-1-15 (date).
 Submitted to Jerre Holmes (person) who works at North Summit School District on 12-1-15 (date).
 Submitted to Sandy Coroles (person) who works at Ogden City School District on 12-1-15 (date).
 Submitted to Ember Conley (person) who works at Park City School District on 12-1-15 (date).
 Submitted to Shane Erickson (person) who works at Piute School District on 12-1-15 (date).
 Submitted to Keith Rittel (person) who works at Provo School District on 12-1-15 (date).
 Submitted to Dale Lamborn (person) who works at Rich School District on 12-1-15 (date).
 Submitted to McKell Withers (person) who works at Salt Lake City School District on 12-1-15 (date).

Submitted to <u>Douglas Wright</u>	(person) who works at San Juan School District on <u>12-1-15</u>	(date).
Submitted to <u>Cade Douglas</u>	(person) who works at Sevier School District on <u>12-1-15</u>	(date).
Submitted to <u>Kent Larsen</u>	(person) who works at South Sanpete School District on <u>12-1-15</u>	(date).
Submitted to <u>Shad Sorenson</u>	(person) who works at South Summit School District on <u>12-1-15</u>	(date).
Submitted to <u>Kodey Hughes</u>	(person) who works at Tintic School District on <u>12-1-15</u>	(date).
Submitted to <u>Scott Rogers</u>	(person) who works at Tooele County School District on <u>12-1-15</u>	(date).
Submitted to <u>Mark Dockins</u>	(person) who works at Uintah School District on <u>12-1-15</u>	(date).
Submitted to <u>Terry Shoemaker</u>	(person) who works at Wasatch School District on <u>12-1-15</u>	(date).
Submitted to <u>Larry Bergeson</u>	(person) who works at Washington County School District on <u>12-1-15</u>	(date).
Submitted to <u>Burke Torgerson</u>	(person) who works at Wayne School District on <u>12-1-15</u>	(date).
Submitted to <u>Jeff Stephens</u>	(person) who works at Weber School District on <u>12-1-15</u>	(date).

9. Form of organization (check)

☒ Nonprofit Corporation
 ☐ Tribal entity
 ☐ Other

10. The governing body of a charter school is responsible for the policy decisions of the school. Please indicate the makeup of this body below. (Add lines as necessary)

Name	Email	Type of Member	Position on Board
Busch Jones	Leadershipacademyofutah@gmail.com	Parent/Professional	Chair
Annie Fisher	anniedfisher@gmail.com	Teacher	Secretary
Ben Lindsey	Blindsey42@gmail.com	Accountant	Treasurer
Brian Langford	brian@mhmlawoffices.com	Attorney	Trustee
Bryon Richardson	bryon@lanv.org	Charter School Administrator	Trustee
Dale Millsap	millsapd@gmail.com	Parent/Professional	Trustee
Valden Longhurst	vql.jobs@gmail.com	Parent/Professional	Trustee
Suzanne Christensen	tylerandsuzanne@gmail.com	Parent	Vice Chair

11. Year school will start: 2017–2018	12. Grades served: 6–12
13. Number of instructional days: 180	14. Number of instructional hours: 990

15. Requested Enrollment

Operational year 1: Grades 1-6: 40 Grades 7-8: 80 Grades 9-12: 160 Total: 280

Operational year 2: Grades 1-6: 55 Grades 7-8: 110 Grades 9-12: 220 Total: 385

Operational year 3: Grades 1-6: 70 Grades 7-8: 140 Grades 9-12: 280 Total: 490

Does proposed grade configuration match resident district grade configuration? Yes ☐ No ☒

16. Target percentage of educationally disadvantaged students (if applicable)

17. Is this application seeking special treatment under UCA 53A-1a-501.9 ? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	18. Is this application seeking priority consideration under UCA 53A-1a-502.5 ? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
19. A charter school may apply to the State Board of Education for a waiver of any rule that inhibits or hinders the school from accomplishing its mission or educational goals set out in its charter. List any waiver requests here (i.e., Rule numbers. Provide details regarding the need for the waiver as Attachment A). N/A	
20. List persons whom you have designated as founding members of the school. Children/grandchildren of a Founding Member (an individual who has had a significant role in the development of a charter school application), children/grandchildren of an employee, and siblings of students currently attending the charter school are eligible for preferential enrollment under both State and Federal Charter School law. Also, identify the percentage of students eligible for preferential enrollment under the status of founder's child or employee child. No more than 5% of students will receive preferential enrollment. People identified as Founding Members are Busch Jones, Ben Lindsey, Brian Langford, Bryon Richardson, Annie Fisher, Dale Millsap, Valden Longhurst, Suzanne Christensen, Catherine Scott, and Ilarene Patton.	

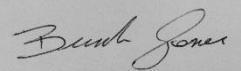
I. Signatures	
WE, THE UNDERSIGNED, do hereby certify that, to the best of our knowledge and belief, the data in this application are true and correct, and that we will comply with the charter agreement if this application is approved. Therefore, this application for charter school status and funding is hereby submitted with the full approval and support of the governing body of the proposed charter school.	
Name of Authorized Agent: Busch Jones	
Signature of Authorized Agent:	

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Executive Summary

Introduction

Leadership Academy of Utah (LAU) is an innovative, statewide charter school. Its mission is to prepare self-directed students for meaningful lives as principled leaders by combining leadership education, the liberal arts, and innovative technology. Toward this end, LAU will:

- attract and be available to students in Grades 6-12 throughout the state of Utah, and will meet or exceed Utah Core Standards in each grade
- employ and train Utah-licensed, qualified teachers that excel at inspiring students to be leaders, first of themselves and then, of others
- offer a set of proprietary leadership courses that are uniquely inspiring and practical
- engage students in classical works of history and literature with the intention of instilling critical thinking skills and a solid knowledge base
- deliver this curriculum through the adept use of creative, challenging assignments, and a foundational set of Six Teacher Practices: The Socratic Method, Connection, Engaging Presentation, Quality Feedback, Modeling, and Project-based Learning
- implement cutting edge and proven technology in innovative ways, always with an eye towards helping students fully engage in the subject matter, while developing their leadership skills.

LAU is aware of significant and substantive concerns about opening another online charter school in Utah at this time, and directly addresses these concerns in the Market Analysis section. Through this application, LAU will show that it is an innovative opportunity to provide students with a liberal arts and leadership-based education combined with a culture of excellence.

LAU will support and bring to public education a growing population of families who have chosen to educate at home. Utah Core Standards and leadership values in a vibrant school culture with many extracurricular activities - including community service -will create a rich learning experience for all Utah students who desire a solid, home-based education. The combination of LAU's leadership theme and courses and synchronous live classrooms will create a school culture that places a premium on learning and leadership.

Over 200 students in Utah have already expressed a desire for the model LAU is creating. They know that our curriculum and practices enrich and extend student learning and personal growth. In this application, LAU will detail why and how it is an outstanding option for Utah's students.

The LAU Board

The governing board of LAU is primarily composed of parents of children who have utilized The Williamsburg Curriculum through private, public, and charter schools, and who are experienced

in a variety of professional fields. They are mostly Utah residents who desire to streamline the process for accessing these courses, and to establish comprehensive elements of school culture and methods based on the Williamsburg model. After witnessing firsthand the remarkable progress of their students enrolled in Williamsburg courses, they are fueled by the desire to enable other Utah students to easily and completely share their life-changing benefits.

Program Overview

LAU is not a traditional, asynchronous, online school choice. It is unique. The key distinguishing factors that set LAU's program apart from existing educational options (online as well as brick-and-mortar) for Utah students in grades 6-12 are as follows: (1) its sequence of inspirational and practical leadership courses; (2) its foundation in the liberal arts and instructional practices rooted in the Socratic Method; (3) its synchronous, engaging, live online classes; (4) its understanding of and sensitivity to the needs of families that educate at home in Utah; (5) relationships built between students, their teachers and their peers through its live classes and outdoor leadership program and; (6) the geographic diversity of its student body.

Leadership - Leadership education cultivates intellectual growth, promotes human excellence (both private and public), and instills individuals with character, competence, and determination to do the right thing and to do it well. Strong, principled leaders are in great demand in today's society, and that is why LAU believes in offering leadership courses.

At LAU, students enroll in a leadership course each semester. The backbone of each course is a weekly accountability report in which students plan and are held accountable for their time and task management. Here, students establish a weekly SMART (Specific, Measurable, Achievable, Relevant, and Timely) goal and report on whether it is kept. Teachers review every report and give personalized feedback, thus encouraging personal, measurable growth in each student.

Liberal Arts and the Socratic Method - LAU will employ the Socratic Method, asking insightful questions to guide and enable deeper student learning, while leveraging current technology to create an energetic, collaborative learning environment. In social studies and language arts, courses will employ classical works and original sources. Teachers will pose thought-provoking questions to help students think critically and independently, and to encourage them to identify strengths and weaknesses in their own positions.

Science and math studies also benefit from this core educational practice. All science courses include science debates or discussions which ask students to ponder their thinking, beliefs, and positions, as well as those of their peers, on issues of relevance to students' lives and futures. Math courses engage students with real-world examples and incorporate an understanding of the history of mathematics to complement the core arithmetic.

Live, Synchronous Classes - Through live, synchronous courses, teachers daily engage students in organic and vibrant discussions about history, literature, leadership, and more. Every school day, students will have access to a virtual Math Lab with friendly, knowledgeable tutors trained in the Socratic Method and eager to help them understand and internalize math in real time. Writing courses, in turn, hold writing labs with teachers ready to guide students in developing their writing skills. All subjects come alive to students at LAU through the use of videos, class discussions, and exploration together with peers in live, synchronous classes.

Reaching the Homeschooling Community - The LAU board members and many team members at Williamsburg Educational Services have homeschooling roots, either as students, or as parents using The Williamsburg Curriculum. They understand the challenges and educational goals of many homeschool families in Utah. When homeschool students reach the teenage years, many parents find they do not have the knowledge or expertise to provide the formative education that they and their children desire. Leveraging resources from statewide homeschool associations and cooperative groups, LAU will ensure that Utah families at this juncture know they have an option that will elicit the full engagement and personal development of their students while giving them essential core knowledge with critical thinking and leadership skills.

Building Relationships - Live, synchronous classes, class discussions, and small group assignments mean that students at LAU will have many opportunities to connect with teachers and peers and to build meaningful, even lifetime, relationships. These relationships would not be possible in a traditional online school where learning is asynchronous and students are left to themselves, with an occasional one to one meeting with a teacher. The culture of LAU will mean lifelines of relationships for students who might otherwise be more isolated.

A bright gem in LAU's partnership with Williamsburg Educational Services, is a unique outdoor leadership course – Elevation. Students (ages 14-18) and teachers both attend, spending five full days building leadership and teamwork skills, building meaningful relationships, and challenging themselves physically and emotionally, and learning from nature. Participants report that this deep and meaningful time together in person fuels deeper, more meaningful relationships in the online classroom. The relationships developed with teachers and staff as well as with peers at LAU will be akin to or deeper than those at a brick-and-mortar school.

Learning with Peers across the Country - Students at LAU have the unique opportunity to learn with and from students from across the United States, broadening perspectives and increasing understanding of people from differing backgrounds, outlooks, and communities. Even in a class of 14 students, the norm is for 4-6 states to be represented. In a larger class, 8-10 states is not uncommon. LAU knows of no other public school in Utah offering this benefit to students.

LAU's promise to Utah students is sure – a rigorous leadership education with a core of liberal arts and technology, delivered in an engaging and meaningful manner.

Section One: School Purpose

The LAU/Williamsburg Backstory

In 2008, James Ure, a constitutional attorney turned educator, and Pete Jensen, an education entrepreneur, founded Williamsburg Academy, a small brick-and-mortar private school with two campuses in Southern Utah. Soon joined by Erin Mwanje, an ardent educator with a degree from Harvard's Graduate School of Education, they searched for a curriculum that steeped students in classical works, taught them how to think critically, and included practical and inspirational leadership principles. Finding no such curriculum in the market, they developed their own. The Williamsburg Curriculum was born. Simultaneously, the team created a professional development program to train teachers to effectively deliver it.

Driven by student excellence in the new curriculum, the Williamsburg team wanted to expand their reach, so they implemented a one-year pilot delivering the curriculum and teaching methods through highly collaborative online software. This went so well that Williamsburg closed both brick-and-mortar campuses and took the program exclusively online. The online private school grew quickly (based solely on word of mouth), spreading to hundreds of students in 30 states within the first two years.

In order to deliver on the promises of its curriculum, Williamsburg quickly discovered that it needed to function more like a blended school, with class sessions multiple times a week in a live, collaborative classroom (think brick-and-mortar school turned virtual), than a traditional online program (offered only asynchronously with students working on their own, submitting online assignments, but not interacting in meaningful ways with teachers and peers). Today, seven years later, this model is proving highly successful. Williamsburg teachers have been nominated for prestigious teaching awards and, in 2014, Williamsburg won the Platinum Award for *Best Practices in Online Teaching*, one of the most prestigious awards in the industry, from the United States Distance Learning Association.

In 2012, a group of Williamsburg parents in Nevada approached the Williamsburg Academy team with the idea of forming a charter school in Nevada around the curriculum and methods used at Williamsburg Academy. In response to this request, Williamsburg founders formed a new organization, Williamsburg Educational Services, to act as an Educational Management Organization (Nevada's Educational Service Provider equivalent). At the time in 2012, Williamsburg had only a dozen students in Nevada, but in fall 2014, Leadership Academy of Nevada opened its doors to 220 students and enjoyed a very smooth and successful first year. Now in its second year, Leadership Academy of Nevada has over 260 students in grades 6-12.

In Utah, where Williamsburg has always had its strongest support base, Williamsburg formed partnerships throughout the years with district and charter schools by which students from these schools could access its courses. Feedback from Utah families indicates they have

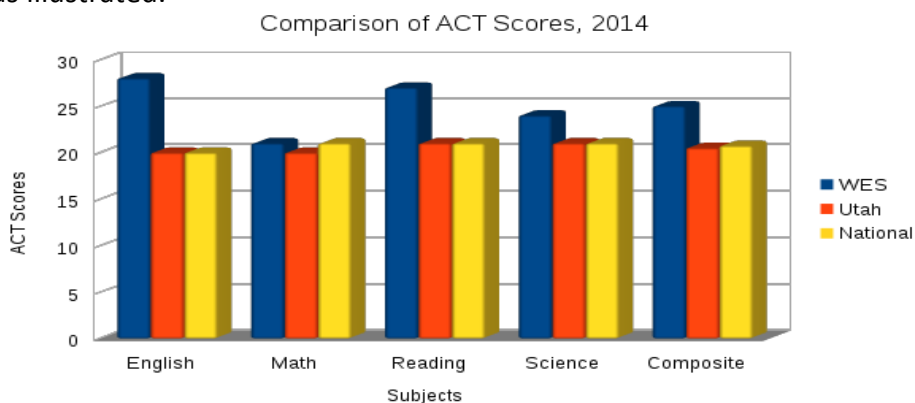
appreciated the opportunity to access Williamsburg’s teachers, curriculum, and culture, but have preserved a strong sense of dissatisfaction with the need to work through partner schools to avail themselves of Williamsburg’s offerings, which are really designed to stand alone. Williamsburg has struggled to transmit the full value of its program to Utah students, who can interact with Williamsburg only as a curriculum provider rather than a full school. As a result, late in 2014, a group of Utah parents approached Williamsburg on behalf of a much larger group of Utah parents and expressed a desire to form a charter school in Utah—one specifically designed to deliver the Williamsburg experience.

Based on the positive experience parents, students, teachers, and Williamsburg Educational Services were having at Leadership Academy of Nevada, Williamsburg Educational Services agreed to help this group of parents with the chartering process, excited at the prospect of starting in Utah with a much larger base of supporters than it began with in Nevada.

School Purpose

In keeping with its mission of preparing self-directed students for meaningful lives as principled leaders by combining leadership education, the liberal arts, and innovative technology, Leadership Academy of Utah will provide a unique, innovative online education for Utah students in grades 6–12 by combining leadership education with a strong liberal arts curriculum using the latest learning technology. LAU meets six of the seven purposes of charter schools as listed in 53A-1a-503, with the seventh purpose concerning “areas where schools have been identified for school improvement, corrective action, or restructuring” and therefore not applicable to a state-wide school.

1) Continue to improve student learning: The average American College Testing (ACT) scores of students attending Williamsburg Academy are higher than both the Utah and national averages, as illustrated.¹



[Note: Not all students at Williamsburg Academy take the ACT, and not all of those who take the ACT list their school’s College Entrance Examination Board (CEEB) code when registering for

¹ <http://www.act.org/newsroom/data/2014/states.html>

the assessment.] This data includes the scores of *all* Williamsburg Academy students who used this CEEB code when registering for the ACT, and Williamsburg Educational Services can find no meaningful distinction between students who use their school's code and those who do not.

The ACT test is administered to gauge probable collegiate success. Students at Williamsburg Academy average a composite score of 25, ranking them in the top quartile nationally. As shown in ACT scores, LAU is implementing a teaching model that improves student learning.

2) Encourage the use of different and innovative teaching methods: No public online school in Utah is currently embracing the Socratic Method as the school's educational foundation as LAU will do. LAU's focus on leadership education is also innovative in that students do not take an isolated course once or twice during their secondary school years, but are required to participate in leadership classes each semester in grades six through eleven, with teachers in all classes reinforcing leadership skills in assignments, projects, and class participation. The Williamsburg Curriculum thrives on innovation and aims to continue to be at the forefront of online learning; LAU teachers and students will reap the benefits.

3) Create new professional opportunities for educators that will allow them to actively participate in designing and implementing the learning program at the school: The Williamsburg Curriculum and classes provide significant opportunity for teachers to create and design courses, including resource and text selections. While Williamsburg Educational Services provides teachers with a course outline and description, and makes sure courses are aligned with Utah Core Standards, each class is annually reviewed and revised by teachers. Additionally, teachers use their personal discretion to design up to 20% of course content each term. The Six Teacher Practices (described in Section Four) within the Williamsburg Educational Services model require teachers be actively engaged in the design and implementation of the learning program, a lost practice in many school settings today.

4) Increase choice of learning opportunities for students: As indicated in number two above, students at LAU will have opportunities for innovative, unique educational growth through LAU's live, fully interactive, online classes utilizing the Socratic Method. LAU's intentional and focused leadership theme as well as the opportunity to learn with students from other states and even countries, make LAU a truly novel and engaging choice for students. Details of how the classroom works with students across the nation are provided in Sections Four and Eight.

5) Establish new models of public schools and a new form of accountability for schools that emphasizes the measurement of learning outcomes and the creation of innovative measurement tools: The use of live online classes, mixing students across the nation, instead of limiting students to their statewide peers, is truly a unique and new school model. While the world has changed drastically in the last 100 years, not much in education has. The founders of LAU believe a liberal arts education combined with leadership development and use of the

latest technology prepares ambitious students for long-term success—a belief shared and embodied by Williamsburg Educational Services and Williamsburg Academy.

6) Provide opportunities for greater parental involvement in management decisions at the school level: “When schools, families, and community groups work together to support learning, children tend to do better in school, stay in school longer, and like school more” (2002).² LAU, conceived by parents with the desire to create a community for their students taught with an online curriculum, understands the absolute need for parental involvement in order to be successful. At the management level, more than half of the governing board are parents. LAU expects that the board, as parents themselves, will use its influence to encourage parents to attend board meetings, voice their opinions, and lobby for any needed adjustments in the school’s direction.

Annual parent satisfaction surveys help assess student and parent satisfaction with the school and regular parent training events provide opportunities for parents to learn, connect, and support their students. Parents are also encouraged to participate in a parent-led school organization—providing additional educational support, social opportunities, feedback, and a learning network for parents and students.

Mission Statement

Leadership Academy of Utah prepares self-directed students for meaningful lives as principled leaders by combining leadership education, the liberal arts, and innovative technology.

Vision Statement – Five to Ten Years from Today

LAU students are passionate learners who are highly engaged in learning and in developing authentic, lasting, and diverse social relationships with other students and teachers. Core activities identify each student’s potential and draw out his/her unique gifts. The rigorous liberal arts education adequately prepares students for collegiate success; the majority of students achieve a composite score on the composite score on the ACT in the 70th percentile or higher. A high proportion of LAU graduates are admitted to and receive scholarships at their college of choice.

LAU graduates utilize their unique gifts to lead in any capacity after graduation, the rigor of The Williamsburg Curriculum having prepared them to successfully adapt to ever-changing technology and to live meaningful, principle-driven lives within a socially diverse culture.

Educational Foundation

LAU believes that to be prepared to lead in the world in which today’s students will live, they will need an understanding of history and the world’s great classics along with real-world skills, such as written and oral communication, problem solving, relevant technology, community

² A. T. Henderson & K. L. Mapp. (Southwest Educational Development Laboratory, 2002)

involvement, and clear vision. Blending leadership education, liberal arts, and innovative technological platforms, students will be inspired to become lifelong learners, develop strong, ethical leadership skills, and maximize their unique gifts and potential. The Socratic Method is the base of all instruction at LAU; the reasons and research behind it are found in Section Four.

Instructional Methods and Curriculum

To realize this ambitious vision, LAU is designed around The Williamsburg Curriculum and its methods. The Williamsburg Curriculum has been utilized by students in the Utah market for several years, and LAU Board members represent many families that have requested the organization of a Utah charter school that provides seamless, full access to this curriculum. The Williamsburg Curriculum is built around Six Teacher Practices, which are used in the facilitation and instruction of each course: The Socratic Method, Connection, Engaging Presentation, Quality Feedback, Modeling, and Project-Based Learning. For more information on these Six Teacher Practices, refer to Section Four: Program of Instruction. As these Teacher Practices guide instruction, students will focus on academic development in leadership and the liberal arts through the use of innovative technology.

Leadership Education

Leadership education cultivates intellectual growth, promotes human excellence (both private and public), and instills individuals with character, competence, and determination to do the right thing and to do it well. Strong, principled leaders are in great demand in today's economy and society. For example, when asked about the most important traits Google looks for in new hires, Laszlo Brock, senior vice-president of people operations for Google, listed leadership skills, saying: "What we care about is, when faced with a problem and you're a member of a team, do you, at an appropriate time, step in and lead."³ Leadership education prepares individuals not only to step in and lead, but also to lead with confidence and integrity.

Liberal Arts Education

Youth preparing to be future leaders need a solid education in the liberal arts. This includes studying classic and modern works, learning to communicate clearly through meaningful discussion and writing, and understanding their place in the global neighborhood. Rather than teaching students "what" to think, a liberal arts education helps students develop the ability to think for themselves—an essential skill for leaders in communities, entrepreneurs in business, and statesmen in government. Those who know "how" to think ask the right questions and find innovative solutions to help build society. A recent study strongly reinforced the value of a liberal arts education, and a *Huffington Post* author summarized the study with the following comment: "The best career preparation for an uncertain future may be the very skills and capabilities that a liberal arts education cultivates."⁴

³ http://www.nytimes.com/2014/02/23/opinion/sunday/friedman-how-to-get-a-job-at-google.html?_r=0

⁴ http://www.huffingtonpost.com/donna-randall/new-study-points-to-liberal-arts_b_4759837.html
<http://www.forbes.com/sites/jordanshapiro/2015/05/16/nothing-prepares-you-for-the-21st-century-like-a-liberal-arts-education/> [Footnote resources continue on next page]

Innovative Technology

Students who learn to fluidly use and adapt to new technology have distinct advantages in today's rapidly changing world. By using online collaboration software and other technology required for class, and through completing technology courses, students naturally develop fluent skills in the latest technologies, and more importantly, become fluid at learning new technologies when new needs arise.

Culture

The following principles are the bedrock of The Williamsburg Curriculum and LAU culture:

- Every student who is self-motivated, academically proficient, and ready for leadership opportunities needs programs designed specifically for them.
- Every student is uniquely talented and can change the world in significant ways.
- Every student inherently desires to live a meaningful life, and that meaning is found by contributing to a cause that is bigger than oneself.
- All positive change begins with principled leaders; the worst damage is done by unprincipled leaders.
- Students inherently desire to be part of a system that gives them the tools and support needed to become principled leaders.
- The leaders of tomorrow need an education rooted in the liberal arts and the proper use of technology.
- Parents, students, and teachers should work together to challenge, uplift, support, and hold students accountable.
- Doing what is right for students, parents, and colleagues, even when counter-intuitive, is the only way to thrive.

For more information on the culture of schools that implement The Williamsburg Curriculum, refer to Section Four: Program of Instruction.

Community

LAU students will benefit from a strong online education combined with community participation within the state of Utah. For example, regular field trips, community service projects, cultural experiences, STEM activities, simulations, outdoor leadership seminars, and workshops provide students with vibrant opportunities for real-life learning and meaningful relationships with community members, other students, and teachers.

A unique and well-loved community-building and educational experience for students is the Elevation Outdoor Course, where students ages 14–18 spend several days together in nature building relationships and leadership skills while engaging in physical activities.

<http://www.sctimes.com/story/opinion/2015/08/22/liberal-arts-education-prepares-students-future/32191831/>
<https://www.aacu.org/press/press-releases/new-report-documents-liberal-arts-disciplines-prepare-graduates-long-term>

Evaluating Mission, Vision, and Philosophical Success

The LAU Board will hire and employ the Executive Director, who will be responsible for heading the evaluation of mission, vision, and philosophical success of LAU. An integral part of that evaluation will be overseeing implementation of The Williamsburg Curriculum through Williamsburg Educational Services. The contract LAU will hold with Williamsburg Educational Services will be reviewed annually to ensure curriculum and practices are in line with the mission, vision, and educational philosophy of the school. A draft agreement between LAU and Williamsburg Educational Services is included in Section Nine, outlining the obligations of both parties. The Board will continually measure success in meeting the goals provided in Section Five. These goals will be updated annually by the Board to reflect LAU's progress and innovations annually.

Section Two: Market Analysis

Current trends, relevant data, and the market position of LAU indicate significant market demand for LAU's model. The first half of this section focuses on the demand for LAU among Utah students and families already familiar with and currently using The Williamsburg Curriculum. The second part explores the demand for LAU based on trends in the broader marketplace.

Demand for LAU among Utah Students and Families Already Loyal to The Williamsburg Curriculum - As discussed in the Section One: School Purpose, the LAU board members represent a broader group of parents whose students have used or are currently using The Williamsburg Curriculum. These parents are thrilled with and loyal to that curriculum and the teaching methods that support it, but are dissatisfied with the current options for accessing it.

Dissatisfaction with Current Options for Accessing The Williamsburg Curriculum, Culture, and Practices - The extent to which Utah families accessing The Williamsburg Curriculum are dissatisfied with working through charter and district schools to access it, and the reasons for that dissatisfaction, reveal a strong base of support for Leadership Academy of Utah. Families accessing the curriculum in this way have shown increasing dissatisfaction with this arrangement over the past several years for a few well-defined reasons, including the following:

- The Williamsburg Curriculum was designed to be delivered as a full-time, integrated program supported by a cohesive school culture, policies and practices, and by professional development practices that reinforce the values which undergird the curriculum. Schools currently offering The Williamsburg Curriculum limit the courses students can take, and these schools do not support the culture and methods used in these courses, thereby depriving Utah families of many of the benefits the Williamsburg model has to offer.
- In a 2013 survey of Utah families accessing The Williamsburg Curriculum, parents of students accessing The Williamsburg Curriculum through charter partners were asked to

rank various elements of the overall Williamsburg experience; 34% indicated that the rigorous, classical curriculum was their top priority; 20% indicated the leadership focus and courses were top priority; 20% indicated that the teachers who deliver the curriculum were most important; 20% indicated that the culture of excitement for learning that undergirds Williamsburg courses was top priority; and 6% said that the flexibility of online learning was most important. These results suggest that these families are interested in Williamsburg as more than a mere online curriculum offering; they want the full Williamsburg experience, and most can't afford to pay private school tuition to get it.

- Many students accessing Williamsburg courses through a charter or district partner identify more closely with Williamsburg than the schools at which they are enrolled. A charter or district school that offers an à la carte menu of online curricula cannot provide the focus and cohesive culture that is possible with a school that has one clear curriculum and program of instruction.
- Many families that have enrolled students at public schools to access The Williamsburg Curriculum come from a homeschool background. These families are showing their eagerness to become public charter school students to access The Williamsburg Curriculum. They would prefer to be involved with a school whose administrative team, instructional team, customer service team, and school culture are all integrated with the core values that drew them to the school/curriculum in the first place.
- Families put up with the challenges of working through a partner school to access The Williamsburg Curriculum because they really have no other choice. For most families, paying out of pocket to access the full benefits of Williamsburg Academy, the private school, is not an option. In the same 2013 survey referenced above, parents responded to a survey question asking what they would do if they could not access Williamsburg courses through a Utah charter or district school; 47% indicated that they would want to pay for Williamsburg courses out of pocket, but felt skeptical that they could afford it; 34% indicated that they would pay out of pocket, but would have to take fewer courses than desired because they could not afford to take the full program; 16% indicated there was no way they could afford private tuition so they would not be able to attend at all. Only 3% said they could pay out of pocket for a full load of Williamsburg courses.

The 2015 Survey to Utah Families Accessing The Williamsburg Curriculum - As a result of the dissatisfaction expressed by Utah families, Williamsburg Educational Services conducted a *second* survey of Utah families accessing The Williamsburg Curriculum to gauge interest in a Utah charter school built on the Williamsburg model. Of those surveyed in 2015, 159 families responded, with 65% saying they would either likely or very likely take advantage of this option.

Very Likely	Likely	Possibly	Unlikely	Very Unlikely
43.4%	22.0%	27.67%	2.52%	4.4%

The number of students, by grade, of those in the “very likely,” “likely,” and “possibly” enrollment categories, was then ascertained, as follows.

School Year	Students in Grades 6–8	Students in Grades 9–12	Total Potential Enrollment
2017–2018	84	121	205

These survey results indicate strong interest among a group of families who are already experienced with and loyal to the Williamsburg model, and who have proven their willingness to enroll in Utah public schools to access The Williamsburg Curriculum.

Justification of School Size and Grades Served

LAU's requested enrollment is modestly fixed at 280 students in the first year, with a third year capacity of 490. LAU plans to serve a small, well-established niche of families throughout Utah who want a curriculum that emphasizes leadership, the liberal arts, and technology, that can be accessed from home. Though The Williamsburg Curriculum is a national curriculum, Utah families have shown a particularly strong interest. Nearly 200 Utah students completed courses in The Williamsburg Curriculum during the 2014–2015 school year, and hundreds more have completed courses since its inception in 2009. Parents of these students have, along with our board members, expressed a loyalty to The Williamsburg Curriculum and a strong interest in a school dedicated to the Williamsburg model, including the curriculum, leadership emphasis, professional development, policies and procedures, and school culture. We expect that these parents will welcome and enthusiastically support LAU.

LAU's enrollment request is also modest in light of the experience of its sister school in Nevada, Leadership Academy of Nevada. The Leadership Academy of Nevada board formed at a time when only a dozen students in Nevada were accessing The Williamsburg Curriculum, and the interest grew to 220 students by the time the doors opened. In Utah, the LAU board is starting with around 200 students who have already been accessing The Williamsburg Curriculum.

With the requested enrollment, and in light of our survey results in 2015, LAU can potentially fill 73% of the seats with minimal marketing. The LAU Board is confident the additional seats can be filled quickly, especially given the trends cited in the next section.

Demand for LAU Based on Broader Market Trends - In addition to the existing base of interest described in the previous section, LAU has reasonable expectations that its model is in demand based on broader market trends, including trends in home-based education and online education in Utah.

Current Educational Landscape

According to the Utah Home Education Association (UHEA), there are currently 7,300 families registered as members, and that number is growing every year.⁵ It is not known how many students these families represent, nor is it possible to know exactly how many students in Utah are currently being educated at home. However, these rising numbers indicate there is a well-established and growing group of homeschooled students in Utah. Many of these families are choosing to enroll their children in some type of private, district, or public charter school offering online courses.

As of the 2014–2015 school year, fully online charter schools were operating in 26 states⁶—including several Utah schools. A school is fully online if it offers all required courses in an online format. According to the Evergreen Education Group, charter schools offering a fully online education “have a higher percentage of schools that use digital tools and content in ways that substantially change the instructional approach, than either traditional public schools or private schools.”⁷

Utah currently supports a Statewide Online Education Program allowing students to access public funds to earn high school credit through qualifying online course providers. In 2013, three statewide, online charter schools served 3,491 Utah students—a 14% increase over the previous year.⁸ Contrast that growth with that of total public school educational enrollment within Utah for the past decade - approximately two percent,⁹ and we see the increased demand for online education options. Statewide, online charter schools serving Utah students in the 2015–2016 school year include: Mountain Heights Academy, Utah Virtual Academy, Utah Connections Academy, and Lumen Scholar Institute. According to the most recent enrollment report, these online charter school enrollment rates are accelerating. Utah Virtual Academy is at about 90% capacity, while Utah Connections Academy (with a student cap of 1,250) is at about 75%, and Mountain Heights (with a student cap of 1,500) is about 33%.¹⁰ Lumen Scholar Institute, which offers online classes and more interaction than traditional online independent study schools, opened in the 2015–2016 school year (with a student cap of 550), and is already at full capacity.

⁵ <http://www.uhea.org/frequency-asked-questions/general/item/101-how-many-homeschoolers-are-there?>

⁶ http://www.crpe.org/sites/default/files/crpe-policy-framework-online-charter-schools-final_0.pdf

⁷ Watson, John, Larry Pape, Amy Murin, Butch Gemin, and Lauren Vashaw. “Keeping Pace with K-12 Digital Learning.” Evergreen Education Group, 2014

⁸ Watson, John, Larry Pape, Amy Murin, Butch Gemin, and Lauren Vashaw. “Keeping Pace with K-12 Digital Learning.” Evergreen Education Group, 2014

⁹ <http://www.schools.utah.gov/data/Superintendents-Annual-Report/2014.aspx>

¹⁰ <http://schools.utah.gov/data/Reports/Enrollment-Demographics.aspx>

Multiple school districts in Utah have offered online programs, created online schools to serve their individual district, or use a blend of online and on location learning. The Utah Online School, created by the Washington County School District, serves 1,600 online students throughout the state. The Athenian eAcademy provides students with a blended online and on location program¹¹.

The rise of online classes and programs for K-12 parallels an online trend for higher education in colleges throughout the country. Massive Online Open Courses (MOOCs) continue to grow¹². As this trend continues, and data about what defines a quality online education accumulates, online schools following best practices are likely to experience sustained growth. LAU views these trends as (1) evidence that Utah families want more from online education, (2) that the demand for online classes will increase, (3) and that LAU will fill all available seats.

Target Population and Population Trends

LAU's target population is secondary-aged students in a homeschooling environment. Most LAU board members and many Williamsburg team members have personal experience being educated at home and/or educating their own children at home. This personal experience gives LAU a sensitivity to the location, needs, and perspectives of this group.

LAU is targeting this group because students in grades 6-12 who educate at home need depth in content knowledge and academic rigor beyond what most parents can provide. These youth yearn for social opportunities and leadership development, and want to belong to a community of like-minded learners, all of which are difficult to provide in a homeschooling environment.

Although many families who educate at home are reticent to go through all the required steps of enrolling in a public charter school, and complying with the ongoing testing and attendance requirements, The Williamsburg Curriculum has proven its ability to incent these families do so, as established by the fact that hundreds families in Utah have enrolled in public charter schools (that do not thoroughly support it) to gain tuition-free access to it.

Nationally, it is estimated that "as many as two million American children are schooled at home, with the number growing as much as 15 to 20 percent per year."¹³ Utah followed that trend going back to 2005.¹⁴ In the 2013–2014 school year, the percentage of students reported as homeschooled was 1.7%, and in the 2014–2015 school year, 1.9%.¹⁵

¹¹ <http://www.sltrib.com/sltrib/news/57580034-78/schools-audit-utah-students.html.csp>

¹² http://www.nytimes.com/2013/09/26/technology/personaltech/a-surge-in-growth-for-a-new-kind-of-online-course.html?_r=0

¹³ <https://www.census.gov/population/www/documentation/twps0053/twps0053.html>

¹⁴ "Home Schooled Students by District, 2005-2012," Excel Spreadsheet, Utah State Office of Education, 2013.

¹⁵ "Home Schooled Students by District, 2010-2014," Excel Spreadsheet, Utah State Office of Education, 2015.

This data does not take into consideration students who receive a public education from home through one of the various online providers—many of whose parents would consider their children homeschooled—which significantly increases the number of homeschooled students.

LAU is aware that students enrolled in its program are no longer homeschooled students, and LAU appreciates the importance of ensuring these students know they are public charter school students who are educating at home.

According to the memorandum of understanding between LAU and Williamsburg Educational Services (See Appendix E: ESP Contracts), Williamsburg is responsible to represent LAU at conferences and recruitment events, and to arrange recruitment meetings with potential students. Williamsburg team members have attended home education conferences in Utah for years. They have presented to parents and youth at many conferences, have a network of and permission to send email marketing to over 1,700 homeschool contacts in Utah, and are well regarded and trusted in the homeschool community. They have also successfully hosted dozens of online and in-person recruitment seminars targeted at homeschool students in Utah, and are well prepared to recruit LAU's target population.

Schools in the Target Location

LAU is targeting secondary-aged students throughout the entire state of Utah, making the school available to any interested Utah student. As an initial frame of reference, the families who responded to the 2015 Survey to Utah Families Already Using The Williamsburg Curriculum are scattered throughout cities and rural areas throughout the state, including Logan, Bluffdale, Magna, Garland, Provo, West Jordan, Syracuse, Bothwell, Taylorsville, West Valley, Manti, Ephraim, Bountiful, Duchesne, Mountain Green, Mendon, Vernal, Spanish Fork, Erda, Cedar City, Cedar Hills, Richfield, St. George, and more. A map identifying schools within a five mile radius therefore becomes irrelevant, as the reach includes potentially every school in Utah.

Student Demographics

As of October 1, 2014, 17% (462 / 2,760 total students) of all students enrolled at Mountain Heights Academy (54 / 426), Utah Connections Academy (141 / 713), and Utah Virtual Academy (267 / 1621) were of an ethnic minority.¹⁶ LAU expects similar demographics.

Information regarding socioeconomic status (as determined by free/reduced lunch eligibility) is not available, as these three schools offer no nutrition program. The educational backgrounds of the community are also unknown, and cannot be reliably obtained with any type of validity.

Justification of Grades Served - LAU acknowledges that a grade configuration of 6–12 is not usual in Utah (although there are districts that do include 6th grade in their secondary

¹⁶ "Fall Enrollment—District by Race/Ethnicity and Gender" Excel Spreadsheet, Utah State Office of Education, October 1, 2014.

program). This configuration is important for the LAU program for multiple reasons, including the following:

- 6th grade is an integral piece of the 6–12 Williamsburg Curriculum, which treats 6th grade as the time to lay a foundation for middle and high school, rather than as a capstone to the elementary years
- 6th grade is a transitional time in a child’s development. Parents of 6th graders are very receptive to exploring alternative educational models, and LAU wants to be an available alternative for these families
- Williamsburg has established a strong correlation between the number of middle school courses a student completes within its curriculum and that student’s success in the high school years, using GPA as the measure of success. The 6th grade year is important.

A more thorough treatment of LAU’s justifications for serving 6th grade can be found in the Program of Instruction.

Distinguishing Factors

As mentioned above, several significant factors differentiate LAU’s model from other schools in Utah, including online schools: (1) unique leadership training, (2) liberal arts focus, with the Socratic Method as the base of instruction, (3) classes are offered within a live, synchronous online setting, and (4) students are exposed to peers and perspectives from other states. For students who are specifically comparing LAU to other online schools available in Utah, students who are a good fit for LAU will be attracted to the following distinguishing characteristics:

Most Online Courses	LAU’s Online Courses
Students watch recordings of lectures.	Courses offer students live, interactive class sessions multiple times each week.
Courses are led by teachers whose primary function is grading assignments. Students in many online programs report a lack of relationship with teachers.	Courses are led by teachers interacting with students in live class sessions. Teachers know students individually and provide individual support. Students using The Williamsburg Curriculum have listed positive relationships with teachers as a top reason for taking Williamsburg courses.
Students have little interaction with peers, learning in what some feel is an isolated environment.	Students regularly learn from peer questions and comments during classes and further interact with peers from Utah and other states in group breakout sessions. Assignments require collaboration, facilitating student friendships and exposing them to new people and alternative ideas.
Many courses still use multiple choice quizzes,	Assignments engage the mind and inspire students

Most Online Courses	LAU's Online Courses
short essays, and fill-in-the-blank questions.	by using simulations, debates, student presentations, moot courts, student-led colloquia, hands-on projects, and more.
Class content is prepared from many different online resources and programs and sewn together into a patchwork that often lacks consistency, engagement, and unifying themes relevant to students' lives.	Proprietary courses are integrated by design, and teachers and administrators are trained to support both individual courses as well as the overall program. All courses are taught and unified by clearly defined leadership themes, providing students with a cohesive and holistic experience.

For these reasons, LAU uniquely stands out from other available online programs, and will fill a definite demand in the market.

Responses to Concerns about Starting another Online Charter School in Utah - LAU board members are aware of several legitimate concerns about opening another online charter school in Utah at the present time, including:

- Utah students already have several online charter school options in Utah
- Several online charter schools in Utah currently have excess capacity
- The recent state audit performed on Utah's distance and online education programs and some problematic practices among certain organizations prompting new regulation
- A general concern about whether online education can perform to its stated promises

LAU board members have seriously considered all of these concerns and are confident LAU is positioned to succeed despite these concerns. It is critical to assess LAU's viability and potential to succeed in light of these concerns by assessing LAU on its own merits, rather than characterizing LAU as "another online school."

First, consider that LAU is built on the Williamsburg model, one distinguished by its sequence of leadership courses, its liberal arts curriculum, and school culture more than by the fact that its live, collaborative classes happen to take place in an online environment. Over the past years, Williamsburg has learned to deliver this curriculum effectively in an online environment, as proven by the *Best Practices in Online Teaching* award received in 2014 (described in the Executive Summary), in order to reach families who share its values throughout the country. Realize that families are attracted to Williamsburg by the curriculum, methods, and culture far more than the online venue, as illustrated by the 2013 survey described above in which 34% of those accessing Williamsburg courses indicated that the rigorous, classical curriculum was their top priority while a mere 6% said that the flexibility of online learning was paramount. LAU is not a traditional online school, but is much more nearly a brick-and-mortar school that enjoys a

compelling curriculum and culture, and in which the live, collaborative classes take place in an online classroom.

Concerning excess capacity, LAU exists to serve the specific niche of families who are intent on securing a leadership-based liberal arts curriculum that can be accessed from home. LAU will also draw from homeschool networks and resources of its supporters to help it achieve its moderate growth plan. No other online public or charter school in Utah could adequately serve them. LAU does not desire to be a “major player” in the field of online education in Utah, as demonstrated by its modest enrollment request. LAU simply wishes to serve the families within this niche by giving them access to the Williamsburg model, which is already working and successful.

Concerns recently turned up in a state audit about Utah’s distance and online education programs. LAU is aware of these issues and will comply with the regulations emerging in response to these concerns, including those contained in R277-417, R277-418, and R277-419.

Regarding general concerns about online education, the Williamsburg team, on whose model LAU is built, and LAU board members, as parents of students using this model, have been working hard for years to carve out a new paradigm toward Williamsburg’s unique brand of synchronous online learning. The Williamsburg brand nurtures meaningful teacher/student relationships, authentic peer-to-peer relationships, and higher order activities in live, collaborative classes, through project-based learning, Socratic questioning/recitation, interactive colloquia, group presentations, and leadership coaching. LAU respectfully invites those who harbor general concerns about online education to revisit their concerns in light of LAU’s unique educational model.

Section Three: Student Population

Realistic Enrollment Projections

The LAU Board has determined it is more important to give each student a quality educational experience, beginning with year one, than to have high enrollment, and has therefore chosen a modest enrollment number that will facilitate a great experience for its students and families. In determining this number, LAU utilized data from a 2015 survey of Utah parents who currently have students receiving Williamsburg Educational Services through another program (previously discussed in Section Two). The following chart shows the demand for a public charter school dedicated to the Williamsburg Educational Services model for the 2017–2018 school year. The requested growth over three years is to accommodate new students who would be attracted to LAU but are not currently receiving an education, in part or in whole, through Williamsburg Educational Services. The total number of students requested by LAU is 490, which is achieved in year three. With current interest, 73% of the requested seats for year one could be filled by students already receiving part or all of their education through

Williamsburg Educational Services. The Board of LAU is confident all seats will be filled prior to school opening.

School Year	Requested Enrollment	Total Students Currently Interested*
2017–2018	385	214 (84 grades 6–8; 130 grades 9–12)

Students Likely to Attend

Given that a large proportion of the students LAU is likely to serve already receive some or all of their education through Williamsburg Educational Services, the defined student population is already well established. Research conducted for Williamsburg Educational Services by an independent third party firm has found there are three main categories of students who are attracted to and participate in Williamsburg Educational Service's schools. One thing common across all groups was the desire for a challenging curriculum that prepares students for college, which The Williamsburg Curriculum has.

Families Who Educate at Home - Students from this subgroup come from homes where there are usually two parents and one (usually the mother) does not work outside of the home. During the elementary years, parents have felt secure in their abilities to educate their children, but have a desire to provide their middle-school aged children with more academic options and a school community without sending them to a public or private school. The Williamsburg Curriculum is appealing to these families because it is focused on the liberal arts and develops leadership skills while still allowing families to educate at home. While the classes are secular in nature, they are not in contradiction with faith-based values commonly held by the majority of families within this subgroup.

Alternative High School Students - In this subgroup, students are struggling with placement in a traditional middle or high school for various reasons, such as learning style, personality, or school environment (too large and/or unsafe). For the majority of this group, educating at home is not something they have experienced or previously considered, but it is a viable option. The curriculum's liberal arts focus and leadership skill development, as well as the social opportunities, are appealing to this subgroup.

Unchallenged or Bored Students - Unfortunately, not all schools and districts can offer a full range of advanced courses in middle and high schools, especially in rural areas. Students in this subgroup are unlikely to have educated at home previously, but they and their parents are willing to consider online school if it provides a meaningful, rigorous educational experience. The social opportunities offered through LAU's interactive classes, activities, and the Elevation summer course make LAU more appealing than traditional virtual school options.

Meeting the Needs of the Target Population

The needs and desires of the three main student subgroups traditionally served by The Williamsburg Curriculum are as follows:

- An academically rigorous college preparatory education, usually with a liberal arts emphasis
- Leadership skill development
- Social opportunities

LAU is uniquely equipped to meet these needs in the virtual school community. The liberal arts-focused classes taught using the Socratic Method provide rigor and preparation for success in college, as documented in Sections One and Four. Regarding leadership skills, students at LAU take mandatory, project-based leadership courses in grades six through eleven that are not available in any other program. The social opportunities that begin each year with Elevation and continue with live, interactive classes and other activities also fill a need in a way other virtual schools do not. Because Elevation is an in-person experience, students have the opportunity to get to know and begin developing relationships with their peers before class even starts, which is truly unique in the virtual education realm.

Serving Students with Disabilities

LAU is dedicated to helping all students reach their maximum potential. For students with learning disabilities, the school will provide all special education services deemed necessary by a student's Individual Education Plan (IEP).

Services and Placement

It is the intent of LAU to provide all students with skills and supports necessary for academic success. LAU will utilize the response to intervention (RtI) approach for all students who may be struggling with academic skills. With this approach, a teacher first identifies the area(s) in which a student is struggling. Strategies are then determined by the teacher and parent, with or without special education consultation, which may be beneficial to the student. If these are not successful, special education consultation and testing will begin in accordance with procedural safeguards.

All special education services at LAU will be in compliance with the Individuals with Disabilities Education Act (IDEA) and State of Utah Special Education Rules. Initially, the Executive Director will oversee the Special Education department, staffed by properly-licensed teachers and paraprofessionals. In addition to special education teachers and aides, LAU will hire or contract with ancillary service providers, including but not limited to, psychologists, speech-language pathologists, occupational therapists, and physical therapists as needs are identified in individual education plans (IEP). As the LAU Special Education population grows, LAU will hire a Special Education Director to oversee the Special Education Program. LAU administration will closely monitor special education caseloads and follow guidelines from the Utah State Office of

Education. Funding will come from special education monies, and if necessary, the general school budget, in compliance with LAU Fiscal Policy.

All students are entitled to a free and appropriate public education (FAPE). LAU provides services along a continuum, making sure students receive their education in the least restrictive environment.

Students requiring academic instruction or related services in addition to those provided in the regular virtual classroom setting will have an IEP in place. The IEP will determine type(s), frequency, and location(s) of service. Special Education services will primarily be provided via a virtual meeting, outside of the regular class time, of a student with the special education teacher, a regular education teacher, or an instructional aide. All live classes are recorded, allowing the student, special education teacher, or instructional aide to review class recordings/material in order for students to be successful. In addition to individual virtual meetings, there may be virtual study halls facilitated by the special education teacher or instructional aide that will provide specific help to multiple students. There is also a Math Lab provided for all students four (4) hours every school day, and writing labs provided four (4) days a week, Monday through Thursday, for one (1) hour each day.

As recordings of all live classes can be reviewed by the special education teacher or instructional aide, as well as by or with the student, there will rarely be a need for him or her to be in the live class with a student. On the rare occasion that the Special Education teacher or instructional aide needs to be in class with the student, he/she will be logged in and able to private chat with the student in order to provide the needed services.

Any facilities LAU may lease for office space, instruction, or testing, including restrooms and building access, will meet the Americans with Disabilities Act (ADA) accessibility requirements.

Qualified Staff

The Executive Director and the Special Education Director are responsible for ensuring all providers are properly licensed and certified to work within the special education program. LAU assures that necessary educational staff and related service providers will be available to ensure all requirements of FAPE are met, in compliance with *USBE-SER IX.F*. The special education teacher(s) will hold a valid educator's license with the appropriate special education endorsement, and all related service providers (i.e., speech language pathologist, occupational therapist, physical therapist, social worker, adaptive physical education specialist, and psychologist) will have valid licenses specific to their disciplines, in compliance with *USBE-SER IX.D* and *IX.H*.

The Executive Director and, when hired, the Special Education Director will be familiar with special education policy and procedure, and will receive ongoing training in Special Education Rules and Regulation through interaction with the Utah State Office of Education Special

Education Department. They will work closely with the special education staff of the school, and will all receive annual training regarding policy, procedure, and best practices. An annual report to the Board of Trustees will indicate the type and amount of training received, as well as a schedule for trainings in the coming year.

The Executive Director, Special Education Director, and Business Manager will receive training regarding allowable uses of restricted IDEA and Utah State special education funds in compliance with *EDGAR*, *OMB A-133*, and *USBE-SER IX* and *X*. They will be responsible for ensuring adequate documentation is maintained and available to support the use of all restricted funds.

Policies

LAU will provide the Utah State Office of Education a Special Education Policies and Procedures Manual for approval prior to November 1 of the first operational year. This manual will be in compliance with Utah State Board of Education Special Education Rules and IDEA, as it was reauthorized in 2004. Staff will be provided with ongoing professional development in key areas identified by the Executive Director and special education department.

Child Find

In order to locate students needing special education services, LAU will actively participate in child find activities. Upon entrance to the school, initial paperwork will ask if the student has a current IEP. If an IEP is in place, records from the previous school will be requested, and special education services will begin immediately in accordance with the existing IEP. The IEP team will then determine whether to adopt the existing IEP or convene a meeting for the purpose of constructing a new IEP. Teachers will receive training on identifying students who may have special education needs at the beginning of each year, with ongoing training through staff meetings or written communication from the Director and/or special education department. In addition, teachers will be provided additional training in all other relevant topics in regard to special education as needed throughout the year.

Procedural safeguards are in place and compliant with IDEA laws. When a child is identified as potentially needing special education services, a request for an initial evaluation is made to the special education department. A parent or teacher can generate this request. Before testing can begin, the parents must sign a “consent to test” form. Upon receipt of the consent to test, the initial evaluation to determine eligibility for IDEA Part B services must be completed within 45 days. If the referral is generated by LAU and parents do not return or refuse to sign the consent to test, the initial evaluation may occur under the due process procedures established by the Utah State Office of Education Special Education Rules. Evaluations will utilize a variety of appropriate assessments, both formal and informal, and will be comprehensive enough to adequately address all areas of need. All assessments will be valid and reliable, and administered by trained and qualified personnel. Observations may also be included as part of

the assessment. Parents will receive a copy of the evaluation results, and if the student is determined to be eligible for special education, an IEP meeting will be scheduled.

Parents will receive a prior written notice about the meeting, which will indicate the mutually agreed upon time, location, purpose of the meeting, as well as who will be in attendance. Parents must also receive a copy of procedural safeguards prior to the beginning of services, and annually thereafter. The IEP meeting is held within 30 calendar days of eligibility determination with the IEP team, which will include all of the following:

- Parent(s);
- At least one of the student's regular education teachers;
- Special education teacher;
- Local Education Agency (LEA) representative (Executive Director or Special Education Director);
- Someone who can interpret assessment results to the team, and may be one of the team members listed above.

The team may also include any of the following:

- Related service providers;
- The student, whenever possible and appropriate;
- Someone with special knowledge or expertise if invited by the parent, or LAU with parental consent.

Alternative participation methods, such as conference calls or virtual meetings may be utilized. A meeting may be conducted without a parent present if LAU has made and kept record of attempts to arrange a mutually agreed upon time and place. Records will include actual and attempted communication made and results thereof, copies of correspondence and any responses, as well as detailed records of visits made to the parent's home or place of employment and results of those visits.

During the IEP meeting, the type(s) of service the student needs, along with where they will occur and the frequency and duration (defined as placement), will be determined. The IEP must include a statement of the student's present levels of academic achievement and functional performance, including how the student's disability affects the student's involvement and progress in the general education curriculum. It must also include measurable goals designed to meet the student's needs resulting from the disability that allow the student access, involvement, and progress in the general education curriculum. Goals must address any other educational needs resulting from the disability, assistive technology the student may need, how progress will be measured and reported, and alternative assessment means and methods with justification if it is determined the student is unable to use the regular statewide assessments. Other elements may be included as determined by state and federal law. The IEP is valid for one year, and it must be reviewed, with a new IEP in place prior to the expiration of the current

IEP. A meeting to review and/or revise a current IEP may be held at any time and must follow the procedural safeguards of a regular IEP meeting.

Special Education Records

If parents have complaints, all grievance policy, as laid out in the most current Utah Special Education Rules, will be followed (last updated 12/09, pages 109–116). This includes requests for amendment of student records as well.

The special education department, under the direction of the Executive Director or Special Education Director, will maintain proper forms and paperwork that are available and used, including, but not limited to:

- Procedural Safeguards Notice
- Prior Written Notice
- Notice of Meeting
- At Risk Documentation
- Referral
- Consent to Evaluate/Re-evaluate
- Review of Existing Data
- Evaluation Summary Report
- Determination of Eligibility
- Individual Education Plan
- Transition Plan
- Services Plan
- Consent for Initial Placement
- Change of Placement
- Notice Regarding Age of Majority Rights
- Summary of Academic Achievement and Performance
- Record of Access
- Access Authorization

When a student on an IEP or 504 Plan transfers to LAU from another school, the special education department will conduct a review of the records within thirty days and then do one of the following:

- If the student has transferred from within the state, the team will adopt the previously held IEP, or develop, adopt, and implement a new IEP that is consistent with federal regulations and *USBE SER* rules.
- If the student has transferred from out of state, the IEP team will conduct an evaluation, if determined necessary by the Local Education Agency, and develop a new IEP, if appropriate, that is consistent with federal and state law.

All transferring students will receive services similar to those required in the existing IEP until the review has been completed and either the previous IEP is adopted or a new IEP is approved and implemented.

All Federal Education Right to Privacy Act (FERPA) laws will be followed at LAU. The confidentiality of personally identifiable information at collection, storage, disclosure, transfer, and destruction stages will be protected and handled in a timely manner. The Executive Director, in conjunction with the Special Education Director, has responsibility for ensuring this confidentiality. All persons collecting or accessing student information are required to receive instruction regarding policies and proper procedures for safeguarding information. A current list of staff with access to records is posted for public inspection, and records are kept in a locked filing cabinet in the Special Education Director's office. A record is kept in each file documenting persons who have reviewed the file, including the name of the party, the date access was given, and the purpose for which the party is authorized to use the records. Additionally, parents must be given access to records when requested unless LAU has been advised the parent does not have legal access due to guardianship, separation, or divorce situations.

Parents must receive notice prior to records being transferred, and when collected personally identifiable information is no longer needed, the parents (or student if age 18 or older) must be notified, and information must be destroyed at their request. A permanent record of student's name, address and phone number, grades, attendance record, classes attended, grade level completed, and year completed shall be maintained without limitation. Records may be considered "no longer needed" and may be destroyed three years after the student graduates or three years after the student turns 22. In accordance with FERPA, the rights of privacy afforded to parents are transferred to the student at age 18, unless declared incompetent by a court order. Prior written notice will be provided to the student and the parent.

Serving English Learners

LAU will comply with all state and federal laws and rules as they relate to providing services to English Language Learners. LAU will contract with an English Language Coordinator/teacher on a per-student basis to provide necessary services and work with other teachers to ensure English language needs are met.

Upon identification of a student requiring English Language services, an Individualized Language Development Plan will be put in place depending on current level of proficiency. LAU will provide a continuum of services for English Language Learner students, based on a three-tier model, as outlined below. The English Language Coordinator will determine the needed level of support and work with content-area teachers to ensure all services are being delivered. The English Language Coordinator will be responsible for training other teachers on how to adapt classes for English Language Learners. The English Language Coordinator will meet regularly

with English language students to reinforce and supplement skills being taught by content-area teachers and adjust the Individual Leadership Development Plan as necessary. LAU acknowledges that self-paced classes may require more support than usual for English language students and asserts that content mastery may be higher in a self-paced class with appropriate English language support. The recordings of live classes that students can review will be a powerful tool English language students and staff can use in language acquisition and fluency.

Sheltered English Instruction is the primary method used for English language students at LAU. Sheltered instruction helps teachers to structure lessons and scaffold activities that build on students' prior knowledge, helps students learn to use the academic language required of them, and allows them to do something purposeful with that new knowledge. This method is best suited for students who have already developed a foundation in the English language.

When a student's level of proficiency does not permit them to function and learn in the classroom using Sheltered English Instruction, English language pull out services will be provided through a separate virtual classroom, outside of the regular classroom times, and may be in small groups, determined by level of language proficiency.

Students will continue to be assessed using formative and summative assessment, with proficiency being determined by the World-Class Instructional Design and Assessment (WIDA) ACCESS assessment tool. As students achieve full proficiency, they will be exited from the program and monitored for two years. If at any time during this monitoring it is determined a student needs to receive additional English Language services, the process described above is repeated.

Serving the Homeless

In compliance with the McKinney Vento Education Assistance Act, LAU will serve homeless students, permitting them immediate access to the school if space is available regardless of whether necessary documentation (i.e., immunization records, birth certificate) is available or not. LAU will appoint a homeless liaison, and will provide other services as dictated by law.

Serving Students with Section 504 Needs

In cases where a student at LAU requires one or more accommodations in order to receive a free and appropriate education (FAPE), an accommodation plan will be put in place as required by Section 504 of the Rehabilitation Act of 1973. LAU will designate a 504 Coordinator, likely the guidance counselor or an administrator, who will oversee 504 services.

Under Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act, an individual with a disability is defined as a person with a mental or physical impairment which substantially limits one or more major life activities, such as seeing, hearing, speaking, breathing, or learning; or a person who has a record of such impairment; or a person who is regarded as having such impairment.

When a student is identified as needing or potentially needing 504 services, a referral is submitted to the 504 Coordinator. At this point, the Coordinator will provide parents/guardians with procedural safeguards information, appropriate data and assessments will be gathered, and a 504 team assembled to include the Coordinator, parents, classroom teacher(s), appropriate ancillary providers, and school administration. A team meeting will be held, most likely virtually, and a 504 plan outlining necessary accommodations will be developed and implemented, with the 504 Coordinator checking in regularly with the student, parents, and staff to ensure accommodations are reasonable and effective.

Outreach and Recruiting

LAU will use various methods, both active and passive, to advertise the school and recruit students. The presence of Williamsburg Educational Services in Utah, combined with families requesting and being actively involved in creating a charter school dedicated to The Williamsburg Curriculum ideals, provides a great recruiting base for LAU to build upon.

Passive methods will include creation of an informative and user-friendly website. On the site families will be able to learn about the philosophy, mission, methods, and curriculum of the school. They will also be able to email with questions and sign up for email updates. A Facebook page for LAU will be established and updated regularly, including a link from Facebook back to the LAU website. Williamsburg Educational Services will provide email marketing, including tracking leads. Other online marketing, such as Facebook or Google ads may also be utilized. Information will also be distributed through Utah's homeschooling networks by founding members, who are well-connected and well-respected within the Utah homeschooling community.

Active recruiting strategies may include free interactive webinars, in-person meetings, open houses, presence at homeschool conventions and events, networking through families in Utah already involved with Williamsburg Educational Services, and other activities as deemed appropriate by the LAU Board and administration.

Lottery, Enrollment, and Admission

Federal and state laws prohibit the selection process from discriminating against anyone regarding religion, gender, race, national origin, color, disability or age. The policies below are in compliance with current Utah State Code and Rule.

Opening Year Lottery - LAU will conduct an open enrollment period from January 1 through February 15, during which the school will conduct extensive advertising. Families will be able to attend an open house or webinar in order to better understand the mission, expectations and programs of the school. Enrollment for the lottery will be done electronically through the school's website. A lottery open to the public will be held between February 20 and March 1, as determined by school administration. The lottery procedure will be as follows:

- Each student applying will receive a number through a random lottery.
- Grades will be filled beginning with twelfth grade and working down.
- Siblings automatically gain admittance once one member of the family is selected in the opening year lottery, unless there is no room in the specified grade.
- Siblings who are not selected through the lottery will be placed on the sibling priority list. These students will be the first contacted when seats in corresponding grades become available.
- The sibling priority list will be compiled based on original lottery number.
- Others will be placed on a list for a future lottery, if needed.

General Lottery Procedure - LAU will conduct an open enrollment period annually from January 1 through February 15, during which time advertising of the school will occur within the community. Families will be able to attend an open house or webinar in order to better understand the mission, expectations and programs of the school, and enrollment for the lottery will be electronic, through the school's website. A lottery open to the public will be held between February 20 and March 1, as determined by school administration. The lottery procedure will be as follows:

- Under Utah Code 53A-1a-506(2)(b)(i and ii) returning students and siblings of returning students will be given preferential enrollment on a space available basis. Any siblings not given preferential enrollment due to space unavailability will be placed at the top of the wait list, with the waiting ordered determined by a lottery. If additional seats are available and more students apply than available seats, a lottery will be held, as follows:
- Each student applying will receive a number through a random lottery.
- Available seats will be filled starting with twelfth grade and working down.
- Siblings of students selected in the general lottery will be granted sibling preference in compliance with Utah Code 53A-1a-506(2)(b)(i and ii) or placed on the sibling priority list. Students who gain enrollment via sibling preference will maintain such preference as long as the originally selected sibling remains enrolled at the school.
- The sibling priority list will be compiled based on original lottery number.
- Students not selected in the lottery or on the sibling preference list will be placed on the waiting list after sibling preferences for a future lottery, if necessary.

Enrollment Preference - In compliance with Utah Code 53A-1a-506(2)(b)(i and ii) the following categories of prospective students, not to exceed 5% of maximum enrollment, receive enrollment preference: students of founders and children of teachers/staff; students of founding members, defined as those who have actively participated in the development of the school as determined by the founding Board; students enrolled the previous year; siblings of students currently enrolled; and children of full-time teachers and other staff as allowed by law.

Exceptions to Enrollment Preference - LAU recognizes that it is not in the best interest of a child to be moved from school to school. Unnecessary change and lack of continuity in curriculum can hamper a feeling of community for the child and family. For that reason exceptions to the enrollment preference list are as follows:

- Children of founding members who leave the school will not be given priority if they return unless there are extenuating circumstances such as, but not limited to, family illness or military duty. Such situations will be reviewed by the Board of Trustees on a case-by-case basis.
- Students who leave the school but have a remaining sibling will not be put on the sibling preference list if they wish to return. They may participate in the general lottery.

Accepting Admission and Forfeiting Admission - Students who are selected through the first lottery to attend LAU will be notified of their acceptance by email, phone call, and/or U.S. mail. It is the parent or guardian's responsibility to make sure all contact information is correct and accurate. Parents will have two weeks from the date of the first lottery to respond by returning the acceptance form by email, in person or via U.S. mail. Forms returned by U.S. mail must be delivered to the school by the due date.

Students who do not respond within the two week period forfeit their enrollment spot and can reapply for the lottery during the next open enrollment period. If there are additional available seats following the two week period, another round of acceptance phone calls and emails will be issued for those on the waiting list. Students in the second and subsequent lottery rounds will have two business days from the notification date to respond or will forfeit their seats. Forms returned by U.S. mail must be postmarked by the due date or they will not be accepted.

Section Four: Program of Instruction

LAU intends to use curricula that are already developed – namely The Williamsburg Curriculum.

Philosophical Approach

The most important factor that will help LAU realize the vision laid out in Section One is The Williamsburg Curriculum and its program of instruction. The Williamsburg Curriculum was chosen because it naturally and seamlessly supports the vision and goals of LAU. Not only does The Williamsburg Curriculum teach material that the founders believe to be both unique and inspiring to students, but it also provides a school culture that encourages success, self-regulation, and positive interpersonal relationships. There are four specific aspects of The Williamsburg Curriculum that LAU wants in its school:

- Curriculum
- Methods
- Culture
- Professional Development

LAU will be the only public school in Utah to offer all aspects of The Williamsburg Curriculum, and, as stated in Section Two, there is already demand for this educational method.

As parents of children who have utilized The Williamsburg Curriculum, Board members can personally attest to the academic rigor, the individual attention, and the general success of this curricular model. Not only have their children experienced remarkable academic growth, increased responsibility and great love of learning while participating in these classes, they have also developed a stronger sense of self, increased confidence in their ability to learn, and a stronger desire to have a positive impact in the world in which they live. They have developed lasting, meaningful relationships with teachers and fellow students. Witnessing such positive developments in their children has fueled the Board's desire to make this curriculum available in its entirety to all interested students in Utah.

The Williamsburg Curriculum

Curriculum for Grades 6–8 - The Williamsburg Curriculum for grades 6–8 is designed to draw out students' natural leadership abilities while building fluency in the liberal arts and technology. Through reading, writing, discussion, and project-based learning, students develop knowledge and understanding of key figures and ideas that have shaped the world today, and they examine how they themselves have been shaped. They also consider how they want to shape their futures, and begin to identify the unique ideas and skills they might contribute to the world. Assignments are designed to help students form personal connections to learning topics, increase content retention, and inspire students to explore more complex subjects in high school.

Justification for Grade 6 - LAU acknowledges that a grade configuration of 6–12 is not usual in Utah (although there are districts that do include 6th grade in their secondary program). This configuration is important for the LAU program for multiple reasons. First, The Williamsburg Curriculum is offered nationally, and it is common nationally to include 6th grade in the middle school years. Williamsburg's integrated, comprehensive curriculum views 6th grade as the foundation for middle and high school rather than as the capstone to the elementary years. Students in 6th grade begin learning about concepts like time management, learning to lead their own education and complete assignments independently, and how to complete assignments in a project-based learning environment. Therefore, the 6th grade curriculum teaches skills and knowledge on which students will build for the rest of their middle and high school experience.

Another key reason for including 6th grade is that it is a transitional time in child development. Many children mature physically around the time of 6th grade, especially girls. Children begin experiencing emotional changes that can be confusing, and many are prepared to show maturity in new ways. Finally, many students are exposed to harmful influences in 6th grade. For all of these reasons, parents of students who educate in the public school system often

begin looking for alternatives when their students are preparing to enter 6th grade, and LAU wants to be available as an alternative at this critical juncture.

Williamsburg has also established a strong correlation between the number of middle school courses a student completes, and that student's success in the high school curriculum, using GPA as the measure of success. The following table compares the GPAs of high school students using The Williamsburg Curriculum who took no middle school courses through Williamsburg, more than three courses, and more than six courses. This data suggests that students using The Williamsburg Curriculum are better served by taking more middle school courses.

	No TWC middle school	More than 3 TWC middle school courses	More than 6 TWC middle school courses
Average GPA	2.87	3.15	3.16
Median GPA	3.51	3.5	3.85

A final reason LAU's program includes 6th grade is that the LAU board and the team at Williamsburg Educational Services share a fondness for the excitement, magic, and awe that 6th graders have towards learning when given the right circumstances, and they want the influence of 6th graders' energy in the program generally.

Curriculum for Grades 9–12 - The Williamsburg Curriculum for grades 9–12 is rooted in the belief that every student has the potential to change the world in significant ways, every student inherently desires a meaningful life, and every student can effectively lead their own lives and relationships if they have the requisite training and desire. In high school, student scholars learn about The Great Conversation between the most influential thinkers and writers of today and the past, and they study some of history's great works of literature, art, and music, with an emphasis on understanding the development of Western civilization. In addition to the required core high school courses, students at LAU will be required every semester in grades 9–11, to take and pass leadership education courses, which align with the overall school vision.

Currently, The Williamsburg Curriculum offers honors courses in the following subjects: Euclidean Geometry, all social studies courses, and all language arts courses, including writing. LAU anticipates the development of additional honors courses.

We anticipate that all students will be required to attend full-time. Full-time, per the graduation requirements, is a minimum of 6 courses (0.5 credits each) per semester. The graduation requirements of LAU will always meet or exceed those of the State of Utah, as described in Section Five of this document.

Leadership Education - As stated in Section One, leadership is crucial to student education today. LAU focuses its leadership curriculum on the ability to make and keep commitments, manage one's time and energy, nurture healthy relationships, and manage financial resources wisely. Leadership courses are geared for students of particular ages and maturities. In middle school, leadership classes meet 4 days a week, with class sizes of 10-15 students, and focus on self-governance, helping students take ownership of their own education, habits, schedule, and family relationships. In high school, leadership courses meet twice a week and focus on time and energy management, articulating a personal mission, strategic goals, key relationships, self-awareness, financial leadership, and preparation for admission to and success in the right college program.

The capstone of each semester's leadership course is a project that requires students to apply the leadership concepts learned. Some of the projects students complete are participating in a national financial investing competition, identifying actions to improve key relationships based on a questionnaire completed by those closest to the student, developing and executing a large service project, and developing and defending a personal mission statement.

Even though these leadership courses are not a state requirement, the founders of LAU believe that they are one of the most important aspects of The Williamsburg Curriculum. Accordingly, The Williamsburg Curriculum's unique, proprietary middle and high school leadership courses teach the following:

Grades 6–8 - Students gain practical knowledge and lifelong habits related to time management, study skills, friendship, relationships, and self-government. Students gain confidence they can develop the academic and social skills necessary to become leaders as they read and discuss the inspirational messages in young adult books such as Hatchet, The Hiding Place, The Secret Garden, Mrs. Frisby and the Rats of NIMH, Wonder, My Side of the Mountain, and Johnny Tremain and, in 8th grade, the non-fiction Who Moved My Cheese for Teens.

Grades 9–12 - Students take courses that focus on making and keeping commitments; learning to manage time, tasks and energy; preparing for college; understanding money and budgeting; and developing and nurturing healthy relationships. They read and discuss great books for teens including Covey's Seven Habits of Highly Successful People, Frankl's Man's Search for Meaning, Leonard's Mastery, Brené Brown's The Gifts of Imperfection, and Clason's The Richest Man in Babylon.

Course Alignment with the Utah Core Standards - LAU recognizes the importance of students mastering the content of the Utah Core Standards, and to that end LAU will take the following steps to ensure The Williamsburg Curriculum courses are properly aligned:

- The Executive Director, an employee of LAU, will be responsible for making sure alignment or correlation is correct and adequate.

- Williamsburg Educational Services will be responsible for correlating classes to the Utah Core Standards and providing documentation to the Executive Director, including any supplemental material the instructors and students may use to cover anything in the Utah Core Standards not already in the course materials. All The Williamsburg Curriculum classes are currently correlated to the Utah Core Standards, as Williamsburg Academy is an accredited school within the state of Utah.
- The contract between LAU and Williamsburg Educational Services will require proof of correlation for each class prior to the beginning of each school year if any substantive changes are made to either the class or Utah Core Standards.
- The Williamsburg Educational Services curriculum committee oversees course design and reviews each course with course instructors and designers annually to make sure student needs and Utah Core Standards are being met.

Methods

As described in Section One, highly-qualified, licensed teachers charged with delivering The Williamsburg Curriculum have deep and meaningful opportunities to not only inspire students to learn, but also to positively influence students' lives. Teachers trained to deliver The Williamsburg Curriculum become highly skilled in Six Teacher Practices through professional development and experience, and they employ these practices in mentoring students every day. These practices are:

The Socratic Method: Ask the right kinds of questions at the right times, teach students how to ask the right questions, and nurture critical thinking. Research supports use of the Socratic Method.¹⁷ Students who are taught consistently using the Socratic Method have shown significant increases in reading comprehension, problem-solving skills, making connections between seminar material, content areas, and real life; communication skills—both listening and speaking; motivation, engagement, and empathy and respect toward others.

Connection: Relate to, inspire, challenge, and develop personal relationships with students. Fully engage students' minds and hearts across diverse learning styles. Help students develop meaningful relationships with each other.

Engaging Presentation: Use powerful hooks, visuals, stories, slides, techniques, and body language to entice learning. Deliver student-centered learning through flipping the classroom, strategically using Bloom's taxonomy.

Quality Feedback: Provide specific and meaningful feedback. Inspire and demand quality work. Encourage creative approaches, solutions, and alternatives.

¹⁷ Thomas, P.E. "Critical Thinking Instruction in Selected Greater Los Angeles Schools." Azusa Pacific University, May 1999.

http://ims.ode.state.oh.us/ode/ims/rrt/research/Content/socratic_seminar_what_we_know.asp

Modeling: Teach skills and attributes by modeling them for students. Above all, a teacher should further his/her own liberal arts education and model an exemplary life.

Project-Based Learning: Use engaging simulations and hands-on projects aimed toward specific audiences and meeting real needs. The effectiveness of project-based learning is proven and documented.¹⁸

Assignments in all courses require students to demonstrate higher order thinking, and include oral exams, student presentations, debates, colloquia, mock trials, and more. Teachers are trained to deliver the curriculum using the Six Teacher Practices which are consistently honed through professional development. LAU's one-of-a-kind program provides an unequalled foundation for students to succeed as self-directed scholars and principled leaders in higher education, future careers, and personal endeavors.

LAU plans to follow a hierarchical structure to implement the curriculum, where the Executive Director oversees teachers, who in turn oversee student instruction and paraprofessionals. The specific definitions of each of these roles can be found in Section Seven: Staffing.

Culture

The Williamsburg Curriculum is rigorous and emphasizes mastery-based learning rather than mere seat time or logged computer time. It requires students to think, question, listen, and defend their positions. It is designed to nurture a positive culture of learning, and it effectively prepares students to achieve outstanding results on standardized tests and transition easily into higher education.

The following principles are the bedrock of The Williamsburg Curriculum and LAU culture. They hold true regardless of the size, complexity, and reach of LAU. They do not change to match educational trends or emerging technology. Rather, trends and technology are used as tools to better instill these timeless core values. Members of the LAU community hold the following as fundamental truths:

- Every student who is self-motivated, academically proficient, and ready for leadership opportunities needs programs designed specifically for them.

¹⁸ "Research. Project-based Learning. N.p., n.d. Web. 11 Feb. 2014," Vernon, D. T. & Blake, R. L. (1993). Does problem-based learning work? A meta-analysis of evaluative research. *Academic Medicine*, 68(7), 550-63.

Mergendoller, J.R., Maxwell, N., & Bellisimo, Y. (2006). The effectiveness of problem based instruction: A Comparative Study of Instructional Methods and Student Characteristics. *Interdisciplinary Journal of Problem-based Learning*, 1(2), 49-69. Retrieved from <http://docs.lib.purdue.edu/ijpbl/vol1/iss2/5/>.

Walker, A. & Leary, H. (2008) "A Problem Based Learning Meta Analysis: Differences Across Problem Types, Implementation Types, Disciplines, and Assessment Levels," *Interdisciplinary Journal of Problem-based Learning*, 3(1), 12-43. Retrieved from <http://docs.lib.purdue.edu/ijpbl/vol3/iss1/3>.

- Every student is uniquely talented and can change the world in significant ways.
- Every student inherently desires to live a meaningful life, and that meaning is found by contributing to a cause that is bigger than oneself.
- All positive change begins with principled leaders; the worst damage is done by unprincipled leaders.
- Students inherently desire to be part of a system that gives them the tools and support needed to become principled leaders.
- The leaders of tomorrow need an education rooted in the liberal arts and the proper use of technology.
- Parents, students, and teachers should work together to challenge, uplift, support, and hold students accountable.
- Doing what is right for students, parents, and colleagues, even when counter-intuitive, is the only way to thrive.

These principles are amplified and exemplified to build school culture through three sets of promises—LAU’s promises to students, to parents, and to its team, stated as:

Promises to Students - LAU will help you (the student) . . .

- Learn to make and keep commitments to yourself, peers, teachers, and parents; and to manage your time and energy efficiently.
- Learn to build others because you want them to succeed; and to use your time and energy for the benefit of others.
- Learn to treat others with humility and humanity; and to identify, improve, and develop key relationships in your life.
- Learn how to apply academic knowledge and skills to your life and leadership.
- Learn how to examine ideas in their historical context; and to understand and empathize with viewpoints different from your own.
- Learn to assimilate relevant data from masses of information; and to conceptualize and reorganize information into new patterns.
- Identify, prepare for, and be admitted to the college program right for you.

Promises to Parents - LAU will . . .

- Provide encouragement, ideas, and coaching to help you support your student.
- Provide opportunities for you to make and keep commitments.
- Provide an intellectually and emotionally safe community of learning.
- Provide your students an education based on mentors, classics, and leadership in the tradition of the liberal arts, combined with the use of technology.

Promises to Each Other - LAU staff and teachers promise to . . .

- Demonstrate excellence at all times.
- Do what we say we will do, when we say we will do it, in respect of each other’s time.

- Give honest, caring feedback in the spirit of continuous improvement.
- Make our jobs more fun by periodically combining work and play.
- Share ideas, lessons learned, methods, and intellectual content generously and without regard to who gets the credit.
- Live with integrity so that we as a team have the moral authority to be examples to youth.

Professional Development

LAU's contract with Williamsburg Educational Services provides that LAU teachers will participate in Williamsburg's professional development program, which revolves around the Six Teacher Practices. Williamsburg provides all teachers with extensive training in the Socratic Method and with a course and materials that inform the other five practices. After hire, Williamsburg Educational Services teachers begin with a live, in-person, two day, 16-hour training. This is followed by work in 10 professional development modules comprising over 75 lessons on teaching effectively using the Six Teacher Practices. Taking the equivalent of two to three more full days to complete, the Williamsburg training also includes lessons on technology systems, curriculum, policies, administrative practices (such as how to manage email), and Williamsburg/LAU culture. Every teacher with Williamsburg Educational Services has significant ongoing professional development training.

Professional development is critical to LAU success. Here is a sample professional development calendar.

WES Professional Development Syllabus					
Default Faculty Huddle Zoom Link (All combined MS & HS Huddles and all other PD events held in this room)					
MS Only Faculty Huddle Zoom Link					
Housekeeping Agenda					
15F - 16W					
Date	Time (MT)	Event	Agenda (Hyperlinked to recording, after event)	Who Participates	Who Presents
Tues, 8/11	9:00 am - 6:00 pm	Staff Orientation	WES Staff Orientation	All Staff	Various Staff
Wed, 8/12	9:00 am - 6:00 pm	Staff Orientation	WES Staff Orientation	All Staff	Various Staff
Fri, 8/14	No Huddle	Faculty Huddle	No Huddle		
Fri, 8/21	9:00 am - 10:00 am	Faculty Huddle	Preparation for New School Year & Intervention Practices Tip: Selecting & Working with Class Presidency (Lucas)	All Staff	Pete & James
Fri, 8/28	9:00 am - 10:00 am	Faculty Huddle	Connection - making connections with students and creating a unified class section; also how to track potential updates to syllabi and master courses Tip: Creating, Saving, & Sharing Slides in Drive (Gary) Tip: Religion in the classroom (James)	All Mentors & LC	James & Gary
Fri, 9/4	9:00 am - 10:00 am	Faculty Huddle	Engaging Presentation - Making Great Powerpoints and Hooks Tip:	All Mentors & LC	Ben
Fri, 9/11	9:00 am - 10:00 am	Faculty Huddle	Project-Based Learning, Pt 1 - Reaching Through the Screen: Using Simulations & other Activities Tip: SIS Tricks for Intervention (Gary)	All Mentors & LC	Erin

Each teacher at LAU is part of a mentor team with a team leader and has a meeting or “synchro,” with that leader at least weekly. The team leader observes and gives feedback on a live online class at least once a month. Additionally, each teacher is observed by colleagues once or twice each semester, receiving additional feedback. The Executive Director of LAU observes and evaluates teachers at least annually and can request specific professional development training for the school as a whole or for individuals. The entire Williamsburg Educational Services team, including LAU teachers, meets weekly for professional development sessions, structured around student needs and the Six Teacher Practices. This training reinforces and applies all that teachers learn during orientation.

Every year teachers are required to provide the curriculum committee and course designer(s) with specific feedback relating to the texts, assignments, and content in each course to ensure The Williamsburg Curriculum courses are continually being refreshed and improved. Teachers also provide feedback relating to how well each course gives instructors the opportunity to demonstrate the Six Teacher Practices. The courses are then adjusted as needed, and additional professional development is provided. This process allows teachers to grow and develop in ways unparalleled in traditional public education. The low teacher turnover rate at Williamsburg Educational Services (listed in a table below) signals satisfaction with the professional development program, as that is one of two main reasons teachers typically cite when moving from one position to another.¹⁹ The academic achievement also indicates teachers are properly trained and professional development is working as it is intended to. LAU will use the surveys of parents and students, as well as teacher observations conducted by school administration, to gauge the effectiveness of professional development and will request changes/improvements by Williamsburg Educational Services as necessary.

A History of Success

Williamsburg Educational Services is the curriculum provider for Williamsburg Academy, a private, online school with students located across the United States, as well as Leadership Academy of Nevada, an online public charter school in Nevada. These two schools serve as the models around which LAU has been developed. The LAU program of instruction, school mission, vision, philosophy, and culture are based on that of Williamsburg Academy. Leadership Academy of Nevada is also built around Williamsburg Academy, but has incorporated Special Education and English Language services, as well as state-mandated testing and other state and federal requirements, into their school. LAU will follow Leadership Academy of Nevada’s procedures in implementing these requirements, thus borrowing from both models. While data on the success of Leadership Academy of Nevada is not yet available, data on Williamsburg Academy is, and it has proven successful. LAU is confident that following Williamsburg Academy’s structure while incorporating state and federal requirements as Leadership

¹⁹ *A Key Teacher Retention Strategy*, by Ann Blakeney Clark of Charlotte-Mecklenburg High Schools. Accessed through <https://www.teachermatch.org/blog/teacher-professional-development-increase-retention/>.

Academy of Nevada has done will yield positive student outcomes. For more information on the history of Williamsburg Educational Services, Williamsburg Academy, and Leadership Academy of Nevada, refer to the Executive Summary.

One of the things LAU founders are passionate about is following the school model as it exists at Williamsburg Academy while meeting all Utah requirements of public schools. To that end, they have recruited Bryon Richardson to be a member of the Board. Mr. Richardson is currently the Director of and employed by Leadership Academy of Nevada. His experience and insight is invaluable in mentoring the future Executive Director of LAU to make sure the culture and school program stay true to the Williamsburg Academy model, providing LAU with great capacity to replicate the Williamsburg Academy model in the public sector.

Further, the use of The Williamsburg Curriculum through Williamsburg Educational Services, along with the contracting of teachers who also mentor students at Williamsburg Academy and Leadership Academy of Nevada, ensures the model is followed. A history of three years of academic achievement, teacher retention rate, and student retention rate for Williamsburg Academy is summarized below. Three years of data is not available for Leadership Academy of Nevada, as it opened in 2014.

	2012–2013	2013–2014	2014–2015
Average Composite ACT Score	25	24	25
Teacher Retention Rate	67%	92%	100%
Student Retention Rate	65%	54%	60%

Many of the students included in the retention rate above used Williamsburg Academy as a supplement to a parent-instructed education at home. Williamsburg Academy has a core of full-time students who are on graduation track and return year after year, along with a high number of homeschool families that flow in and out of Williamsburg Academy each year, taking a single course here and there. LAU intends to require students to attend full time, eliminating the sporadic involvement of students who want only a course or two. Survey data from 2012–2015 show a high parent satisfaction rate for Williamsburg Academy, as illustrated.

Satisfaction with Williamsburg Academy	Ratings of "Excellent" or "Good"
Teachers and administrators respond to your communication within one business day	92%
Teachers and administrators listen to you and respond to your needs	94%
Technology systems (including the Learning Management Systems and SIS)	85%

Satisfaction with Williamsburg Academy	Ratings of "Excellent" or "Good"
are easy to use	
Technology systems are functional (not broken)	99%
Satisfaction with Williamsburg Academy teachers	98%
Satisfaction with curriculum (including texts, assignments, projects, and emphasis on leadership and the liberal arts)	94%
Net Promoter: Would recommend Williamsburg Academy to friends or family	95%

The successful practices of Williamsburg Academy that LAU believes will benefit students include:

- Focus on a liberal arts education with the Socratic Method as the base instructional method;
- Focus on development of leadership skills;
- Use of live, online courses to promote social interaction and use of leadership skills;
- The use of the Six Teacher Practices;
- A robust professional development program narrowly tailored to support The Williamsburg Curriculum;
- Participation in the Elevation course.

As mentioned in Section Two, LAU board members are aware of several legitimate concerns about opening a charter school that is fully online; however, LAU's board members are confident in the online instruction offered by The Williamsburg Curriculum. In 2014, Williamsburg won the Platinum Award for *Best Practices in Online Teaching* from the United States Distance Learning Association, one of the most prestigious awards in the industry. The criteria for this award included:

- Presentation Skills
- Interactivity
- Student Support
- Effective Assessment
- Communicating High Expectations
- High Quality Content

LAU plans on modeling its online instruction on that of Williamsburg Academy, and while implementing the best practices of online education, the founders of LAU are confident that their unique model for online education will be successful for students, families, and the school.

Online Education

LAU **does** intend to offer an online education. The Williamsburg Curriculum currently offers approximately 80% of their classes in a live, online format, and students are encouraged to enroll for the live version, although self-paced courses are offered (with the exception of

leadership classes, which students are currently required to take live), and are taught through self-paced modules, overseen by teachers licensed in the state of Utah. At this time, approximately 90% of students taking The Williamsburg Curriculum courses select live online classes.

Students utilize online collaboration platforms, such as Blackboard Collaborate™ and Canvas™, to gain access to their teachers and curriculum and complete assignments. Teachers have a virtual classroom that students log into for class, and attendance is monitored. Each teacher has set office hours in his or her virtual classroom during which students can meet with them face to face with questions, to discuss concerns, or to receive additional support and instruction. Each live class is recorded and archived, which is helpful for students who may need to review information covered during a class or to watch if they were unable to attend. In self-paced classes, teachers still have set office hours during which students can request specific assistance. Teachers are available at other times as well if requested by the student. Refer to Appendix F for more information on how classes are conducted in an online environment.

Technology Requirements

In order to effectively attend and participate in LAU classes, each student will need:

Internet Connection: A reliable Internet connection (at least 4 Megabits/sec (Mbps) download speed and at least 0.5 Mbps upload speed). Faster is better.

Computer: Access to a computer for several hours each day, depending on the course load. LAU recommends students taking four or more courses have their own computer (not shared with another student) to avoid scheduling conflicts with live class sessions. Any mid-level Windows 7 or higher laptop or desktop computer that is up to three years old should work well. Any Mac laptop or desktop that is up to four years old should work well. Chromebooks (small laptops running the Google Chrome operating system) will *not* work. A machine with a processor of at least an Intel i3-level should suffice.

Software: An office productivity suite (word processor, spreadsheet, presentations) like Microsoft Office or Apple iWork is required. *OpenOffice.org* and *LibreOffice.org* offer excellent free alternatives. Students submit most assignments in Word or OpenOffice/LibreOffice formats; students using iWork will learn to save their documents in Word or OpenOffice formats before submitting. Google Docs is also useful, but not sufficient alone because students need to upload documents into the Learning Management System.

Browser: Firefox is the most friendly web browser for use with most Learning Management Systems, and Internet Explorer the most difficult, but LAU lets families decide which platform works best for them. The most recent version of the web browser should always be used.

Tablets: A tablet alone will not be sufficient for the LAU program, but many students find tablets useful for reading, taking notes, doing research, and emailing.

Microphone or Headset: Many computers have a built-in microphone that will work well and allow the student to be heard clearly. If a quality built-in microphone is not available, then a headset should be purchased. Most headsets have echo-canceling built in, an essential feature. LAU recommends a headset that physically connects to the computer instead of a wireless connection. A quality headset may be purchased for less than \$20.

Setting/location: A quiet place to attend online classes, complete assignments, and do self-paced course work is essential. The computer needs to be located in an area free from visual distractions and ambient noise, allowing the student to interact with teachers and students in a live session using a microphone and webcam.

LAU plans to provide laptops or computer reimbursement options to students in economic need and to those families who have more than one student enrolled at the school. The computers will remain the property of LAU and will be checked out to students for the duration of the school year.

Additional technology resources include:

Student Information Services (SIS) Account: Student Information

Services is the online system parents use to register their student(s) for courses, view snapshots of their students' academic progress, and access transcripts and grades for completed courses. Parents create their own Student Information Services accounts first (each parent, when applicable, should create an account), then add students individually. Williamsburg Educational System will provide LAU with access to its custom Student Information Services under a separate LAU account. The Student Information Services is custom-tailored to support students, teachers, and families using The Williamsburg Curriculum.

Learning Management System (LMS): Canvas™ is the Learning Management System used by the Williamsburg Educational System and by which students receive and submit assignments, complete some of their studies, collaborate with classmates, and access their course syllabi and assignments.

Blackboard Collaborate Web Conferencing: This is where the live online classrooms and math and writing labs are found.

Zoom: The backup online classroom (and where some teachers hold office hours and certain class sessions).

Technical Support: All teachers receive training and are required to be competent in troubleshooting problems with students as they first connect to the online classroom. Additionally, technical support is available via e-mail anytime live classes are offered, and Williamsburg Educational Services has a hotline families can use from 10:00 a.m. to 6:00 p.m., Monday through Friday, except for holidays.

Attendance

Being present and participating in live classes as well as keeping current with assignments in both live and self-paced courses is critical for success at LAU. Using the Carnegie Unit of 60 hours per semester credit, LAU students can plan on spending 36–42 hours per week participating in live classes, doing self-paced coursework, and completing projects and assignments. Utah law requires students attending a traditional school to receive 990 hours of instruction annually over the course of 180 days. Assuming students are receiving instruction or working on projects and assignments seven hours per school day, they will accumulate 1,260 hours of learning time over the course of a school year.

Teachers will document attendance and participation through the Learning Management System (aka Canvas™), allowing the school to track whether students are turning in assignments and exams on time, whether they are on pace with their coursework, and if they are logging into the LMS and spending time there regularly. Canvas functions as the master registrar of enrollment and attendance, and can alert school administration, teachers, and parents of concerns with attendance and participation. LAU requires students to log 990 hours per year between live classes and work submitted in Canvas. Suggested daily and weekly student schedules for both the middle and high school programs are as follows:

Sample Weekly Schedule for Grades 6–7

	Blue = class time	Green = individual learning time	Gray = free time		
MST	Mon	Tue	Wed	Thu	Fri - Library Day
8:30	Learning journal				Free time
9:00	Khan math projects and practice				
9:30					
10:00	Humanities reading and projects	Humanities class	Humanities reading and projects	Humanities class	Challenge Hum reading and projects
10:30					
11:00	Free time				Challenge STEM reading and projects
11:30					
12:00	Leadership class				Catch-up
12:30					
1:00	Humanities reading and projects	STEM class	Humanities reading and projects	STEM class	Free time
1:30					
2:00	Science projects	Science Projects & Videos	Science projects	Science Projects & Videos	
2:30					
3:00	Self-Paced Writing	Self-Paced Writing	Self-Paced Writing	Self-Paced Writing	
3:30	Leadership reading and projects	Leadership reading and projects	Leadership reading and projects	Leadership reading and projects	

Program	Weekly class hours	Weekly study hours	Total weekly hours	Average daily hours
Leadership	2	4	6	1.2
Humanities	2	5	7	1.4
STEM	2	5	7	1.4
Math	0	5	5	1
Self-Paced Writing	0	2	2	0.5
Free time	n/a	n/a	9	1.5
Totals	6	21	35	6-8

Sample Weekly Schedule for Grade 8

	Blue = class time		Green = individual learning time		Gray = free time	
MST	Mon	Tue	Wed	Thu	Fri - Library Day	
8:30	Learning journal					
9:00	Khan math projects and practice					
9:30						
10:00	Humanities class	Writing class	Humanities class	Writing class	Challenge Hum reading and projects	
10:30						
11:00	Free time				Challenge STEM reading and projects	
11:30						
12:00	Humanities readings and projects				Catch-up	
12:30	Leadership class					
1:00	STEM class	Humanities reading and projects	STEM class	Humanities reading and projects	Humanities reading and projects	
1:30						
2:00	Science projects & readings				STEM readings and projects	
2:30						
3:00	Leadership reading and projects	Writing 8 assignments	Leadership reading and projects	Writing 8 assignments	Free time	
3:30						

Program	Weekly class hours	Weekly study hours	Total weekly hours	Average daily hours
Leadership	2	4.5	6.5	1.5
Humanities	2	6	8	1.5
STEM	2	6	8	1.5
Math	0	5	5	1
Writing 8	2	2	4	1
Free time	n/a	n/a	5	1
Totals	6	23.5	36.5	7-9

Sample Weekly Schedule for Grades 9–12

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7:00 AM	Weekly Plan	Daily Plan	Daily Plan	Daily Plan	Daily Plan
8:00 AM	Leadership Class	Science Class	Leadership Class	Science Class	Individual Study Time
9:00 AM	History Class	Math Class	History Class	Math Class	
10:00 AM	Literature Class	Leadership Homework	Literature Class	Leadership Homework	Visit Mentor Office Hours
11:00 AM	History Homework	Literature Homework	History Homework	Literature Homework	Student Clubs (debate, student government, etc.)
12:00 PM					
1:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch
2:00 PM	Math Homework	Math Homework	Math Homework	Math Homework	Math Homework
3:00 PM	Science Homework	Science Homework	Science Homework	Science Homework	Science Homework
4:00 PM	Exercise, Team Sport or Music Practice	Exercise, Team Sport or Music Practice	Exercise, Team Sport or Music Practice	Exercise, Team Sport or Music Practice	Exercise, Team Sport or Music Practice

Students should log into the Learning Management System every school day and should submit assignments regularly so they are on pace to finish their courses by the end of the semester. If a student does not log the suggested time each week and does not submit assignments on time, the student is considered absent, and LAU staff will contact the student and parent. LAU will follow state guidelines for handling and reporting chronic absence.

Properly Licensed and Endorsed Teachers

LAU contracts with individual teachers, and is responsible to assure that all teachers are properly licensed and endorsed. All teachers will be required to obtain and maintain an appropriate license to teach in Utah and will be entered into the CACTUS system through LAU.

Ensuring Authenticity and Adequate Assessment Proctoring - Often lacking in an online learning environment is student accountability. That is not the case with The Williamsburg Curriculum. It uses many checkpoints to hold students accountable for their education and ensure student work is honest and fair. These checkpoints include class discussion, oral evaluations, pictures of completed projects, writing summaries of learning activities, and careful regulation of grading. Teachers observe the checkpoints and interact personally with each student, giving teachers a chance to personally examine individual learning and understanding. See Section Five: Performance Measures for details about the policies and procedures that are LAU will use to ensure the authenticity of student work.

LAU is a content-mastery based school, meaning student grades are based on their mastery of the content material. To verify that mastery, LAU will require class finals to be proctored by a non-relative, preferably in a public setting (e.g., a public library), and will have official proctoring policy and procedures in place prior to school opening. Submitting authentic work is part of a broader culture of leadership, particularly leading one's self, which encourages students to be honest.

Cooperative Learning Opportunities

LAU looks forward to creating an active, in-person Utah student community through regular field trips, cultural experiences, STEM activities, simulations, service projects, and workshops. It is anticipated that activities will be held at least monthly and will be structured around student needs, as determined by the school administration.

School Communication

Communication between LAU teachers, students, and parents is critical given that students are not in the same physical location with school administration and teachers. LAU teachers will generally communicate with all students at least weekly in live, synchronous classes, or by video chat, email, internal messaging system, and/or phone. After multiple unexcused absences, the teacher will proactively reach out to the student and/or parents to offer help, support and accountability.

Teacher conferences will be held at least once per semester via online video conference. Parents can also contact teachers at any time, and can attend weekly office hours with their students to meet with teachers via live virtual meeting.

Serving Students with Disabilities

As outlined in Section Three, all students with disabilities will receive a free and appropriate education. LAU has developed a plan, which has been detailed previously, to make sure Special Education needs are met. LAU will hire or contract with a Special Education Director as well as special education teachers and ancillary service providers as required by individual IEPs. Additionally, all live classes are recorded, and students are able to go back and watch and review information as needed, which is a valuable tool for all students and may be especially beneficial for those with special education needs and those who assist them. The special education department may create small group virtual classes, in order to meet with groups or individual students or to work with students in self-paced classes. Additionally, teachers will generally make at least two in-person visits (at home or an agreed upon public location) during the course of the school year. It is anticipated that the special education teacher will meet at least weekly with students either in a virtual classroom or in person.

Student-to-Teacher Ratio

LAU will have a student/teacher ratio limit of 35:1 in live classes and 50:1 in self-paced classes. LAU can request evidence of classroom enrollment at any time from Williamsburg Educational Services. A snapshot showing current class enrollment is included below. Monitoring the student/teacher ratio through communication with teachers who are contractors with LAU serves as a check and balance, as does verification of class size.

ID	Status	Semester	Delivery	Mentor	Cohort Description	#Enrl	Max	LMS	LMSID	Begin	End
23395	Active	Fall 2015	Live Online	Willis, Jaylee	Algebra 1A (sec. 1: T,Th @ 9:00 AM MT)	28	35	Canvas		08/17/2015	12/16/2015
23413	Active	Fall 2015	Live Online	Willis, Jaylee	Algebra 1A (sec. 2: T,Th @ 11:00 AM MT)	26	35	Canvas		08/17/2015	12/16/2015
23432	Active	Fall 2015	Live Online	Willis, Jaylee	Algebra 1A (sec. 3: T,Th @ 1:00 PM MT)	23	35	Canvas		08/17/2015	12/16/2015
23424	Active	Fall 2015	Live Online	Willis, Jaylee	Algebra 2A (sec. 1: T,Th @ 12:00 PM MT)	22	35	Canvas		08/17/2015	12/16/2015
23439	Active	Fall 2015	Live Online	Willis, Jaylee	Algebra 2A (sec. 2: T,Th @ 2:00 PM MT)	16	35	Canvas		08/17/2015	12/16/2015
23389	Active	Fall 2015	Live Online	Maucotel, Sydney	American Literature A (LA 10) (Honors) (sec. 1: M,W @ 9:00 AM MT)	32	35	Canvas		08/17/2015	12/16/2015
23400	Active	Fall 2015	Live Online	Maucotel, Sydney	American Literature A (LA 10) (Honors) (sec. 2: M,W @ 10:00 AM MT)	33	35	Canvas		08/17/2015	12/16/2015
23407	Active	Fall 2015	Live Online	Maucotel, Sydney	American Literature A (LA 10) (Honors) (sec. 3: M,W @ 11:00 AM MT)	33	35	Canvas		08/17/2015	12/16/2015

Assessment Plan

LAU plans to incorporate both formative and summative assessment in its educational plan. For detailed information on how LAU plans to administer assessments, refer to Section Five: Performance Measures.

Evaluating Program Effectiveness

The LAU Board will meet annually to assess the effectiveness of the online school program. The Board will employ three primary measures for measuring success—ACT scores, state testing

results, particularly as they relate to growth, and parent and student satisfaction surveys. If LAU is not making progress toward or achieving goals defined in Section Five, the Board may re-evaluate the effectiveness of the online provider and/or program. Even though the founders of LAU feel strongly that The Williamsburg Curriculum fully meets the needs of the school, it is possible that this curricula may encounter unforeseen future events. The education service provider (ESP) contract (See Appendix E: ESP Contracts) allows the LAU Board the legal option to choose any other curriculum at any time for any reason. LAU is under no obligation to provide its students with only one method of instruction and will hold its ESP accountable.

Discipline

The Socratic Method of instruction requires a school culture of respect—respect for one’s self, respect for the rights and opinions of others, and respect for staff. Teachers create this culture in the live online classes by example, reinforcement of positive behavior, and remediation when necessary. The disciplinary procedure followed when a student violates the school code of conduct is as follows:

First Offense:

- The parent/legal guardian shall be notified.
- Policies shall be reviewed with the student and his/her parent/legal guardian.
- A warning shall be given and documented regarding the consequence(s) for any future policy violation.

Second Offense:

- The parent/legal guardian shall be notified.
- School-determined consequence for second offense is implemented and student will be placed on Academic Alert.
- Policies shall be again reviewed with this student and his/her parent/legal guardian.
- A further warning shall be given and documented regarding the consequence(s) for any future policy violation.

Third Offense:

- The parent/legal guardian shall be notified.
- School-determined consequence for third offense is implemented; student may be suspended for a determined length of time or expelled from the school, in compliance with *UCA 53A-11 Part 9*.
- Policies shall again be reviewed with this student and his/her parent/legal guardian.
- A further warning shall be given and documented regarding the consequence(s) for any future violation.

When a student violates a school rule, he/she will be required to use Socratic-type questions to analyze behavior, determine how to make and carry out restitution, and determine how he/she will prevent such behavior in the future. Minor infractions will be handled by the teacher; repeat offenses will initiate a conference between the parent, student, teacher(s), and possibly school administration. Major infractions will be handled by the school administration, following approved disciplinary policies.

LAU will comply with all laws and regulations relating to student discipline, currently found in Section 9 of Utah Code *UCA53A-11*. The school's policy for discipline, suspension, and expulsion can be found in Appendix G: Policy for Discipline, Suspension, and Expulsion.

Parental Engagement

Because of the online nature of LAU, parental engagement is critical to student success. LAU has a variety of strategies to encourage and foster parental engagement, outlined as follows:

- At the beginning of each school year parents/guardians are required to attend an online parent orientation to discuss expectations, and view tutorials about accessing The Williamsburg Curriculum and succeeding, especially in the self-paced courses.
- Each semester parents/guardians complete a pre-semester checklist to ensure they understand the course requirements for their student(s) for the coming semester.
- Parents and students have a weekly meeting to discuss progress, concerns, and achievements using guidelines provided by LAU/Williamsburg Educational Services for effective meetings.
- Parents are required to participate in parent trainings, provided by LAU and assisted by Williamsburg Educational Services, offered at least once each semester.
- Parents are asked to complete LAU surveys, which will be used in measuring satisfaction with the LAU culture, The Williamsburg Curriculum, and student progress.
- Parents are encouraged to participate in social groups with other LAU families.

Career Education

LAU **does not** intend to offer career education.

Gifted Education

LAU **does not** intend to offer gifted education.

Four Year College and/or University Affiliation

LAU **does not** intend to have an affiliation with a four-year college or university at this time. Students who desire college credit may choose to take advanced placement exams.

Section Five: Performance Measures

Accountability is critical for success in any venture, and especially in education. LAU has set six goals or performance measures which it believes will accurately measure student (and school) success. These goals are listed in the table below.

One LAU goal centers on high performance on the ACT. It is anticipated that this goal will require administration and teachers from all grade levels to work together to promote high academic achievement in the four content areas of the ACT: English, math, reading, and

science. The percentages in this goal are based on the average ACT scores of students using The Williamsburg Curriculum between 2012 and 2015, which hovers around the 75th percentile, cumulatively.

LAU emphasizes a leadership education that prepares students for college and life, and four goals were set to reflect success in these areas. The final goal revolves around teacher mastery of the Six Teacher Practices described in the Program of Instruction. The percentages in this goal mirror traditional grading and survey trends among students using The Williamsburg Curriculum, which LAU hopes to replicate.

Measure	Metric	Board Goal
National percentile ranking using ACT scores	Percent of graduates who score in the 70th percentile or higher on the ACT test	After three years of operation, at least 50% of LAU graduates who were enrolled at LAU full-time for at least two consecutive years will achieve a composite score in the 70 th percentile or higher.
Leadership ability to manage time and tasks effectively	Demonstrated mastery of weekly scheduling and daily task management	All students in grades 6–11 will be enrolled in a leadership course. All students in leadership courses are required to submit a weekly schedule and accountability report. At least 85% of students enrolled in leadership courses will achieve 70% or higher on the required weekly schedule and accountability report.
Leadership ability to identify and improve key relationships	Percent of students completing the Social Leadership project	All sophomores will be enrolled in the Social Leadership course for two semesters. At least 85% of those enrolled will achieve 70% or higher on the Social Leadership project, requiring students to identify and take specific action to improve key relationships in their lives.
Leadership ability to manage finances effectively	Percent of students completing the Financial Leadership course	All juniors will be enrolled in the Financial Leadership course for one semester. At least 85% of those enrolled will achieve 70% or higher in the course, requiring students to demonstrate mastery of personal finances.
Preparation for college admissions process	Percent of students completing the College Leadership Project	All juniors will be enrolled in the College Leadership course for one semester. At least 85% of those enrolled will earn a grade of 70% or higher on the College Leadership Project, which requires students to perform research to learn about which colleges would be a good fit, identify admission requirements, create clear mile-markers to admission, perform research to learn the most common pitfalls, and develop personalized action plan to improve ACT/SAT scores.
Teacher mastery of Six Teacher Practices	Annual student survey	All high school students will take an annual survey ranking teacher performance in the Six Teacher Practices. At least 80% of students will agree or strongly agree that teachers are demonstrating mastery of the Six Teacher Practices.

Assessment Plan

LAU believes assessments should be diverse and abundant, and should inspire student learning. Assessments perform two functions at LAU. They provide new learning opportunities and perspective and measure skills and knowledge. Formative assessments used throughout the semester will gauge student and teacher progress, and summative assessments used at end-of-term and end-of-year will provide comprehensive measures of proficiency. Formative assessments provide opportunities to evaluate progress while still in the midst of learning. In The Williamsburg Curriculum, varied formative assessments are administered frequently to provide an important feedback loop between teachers and students.

Authenticity of Student Work - The Williamsburg Curriculum employs assignment types that require students to demonstrate mastery of higher order thinking skills, in alignment with LAU's emphasis on critical thinking and the liberal arts. It is crucial that students' work be their own. Many of these assignment types require students to apply skills and/or knowledge to real world projects or real or hypothetical fact patterns uniquely constructed for each course. This makes plagiarism difficult and in many instances impossible. Additionally, The Williamsburg Curriculum employs many assignment types, such as oral exams and colloquia, which require teachers to assess students in a synchronous environment, which also limits plagiarism. Assignments delivered synchronously are recorded, as are all synchronous learning sessions, so teachers can review the recordings as necessary to explore possible incidents of plagiarism. Some assignment types employed by The Williamsburg Curriculum include:

Verbal exams in which teachers guide students through mid- or end-of-term assessment questions. This allows teachers to reveal the scope and extent of student learning by asking follow-up questions based on student responses, changing hypothetical fact patterns on the fly, and asking personalized questions about how students are incorporating new knowledge and/or skills into their daily lives.

Projects that require students to apply concepts to real-world situations.

Student audio/video presentations in which students create slides and narrated videos to share with their peers.

Simulations in which students are given roles to play in fictional scenarios. For example, students in social studies courses simulate constitutional conventions, moot courts, and other high-intensity situations that capture student interest and provide them with the opportunity to practice both their knowledge and leadership skills.

Study guides requiring student response to key curriculum questions (also providing students with an important study tool to help them prepare for final assessments).

Essays that ask students to respond to intellectual and personal prompts that guide students to form meaningful connections to the knowledge they are demonstrating.

Colloquia in which students participate in a discussion about a particular reading, then rate themselves based on their contributions, using established criteria.

End-of-term summative assessments, including proctored, comprehensive final examinations.

These assessments also serve another important function for teachers: to help identify students who are struggling so teachers can perform timely, weekly intervention. Teachers send messages to students and their parents when a student's grade approaches or drops below 70%. Using this benchmark, teachers, students and parents are all informed of a student's progress and can step in to help early if the student struggles with formative assessments.

In addition to frequent formative assessments, summative assessment provides data to meet the second function of assessments: measuring skills and knowledge. Data gathered through these assessments serve two main purposes:

- Helps students understand and gauge the extent of their skills and knowledge.
- Identifies trends and statistics from which teachers and the school can make informed and relevant goals related to their responsibility for student learning.

Summative assessments used by The Williamsburg Curriculum include:

End-of-term summative assessments, including proctored, comprehensive final examinations

Standardized state testing

ACT testing and college admission exams

LAU will participate in all state standardized assessments as required by state law and State Board of Education policies. For LAU's grade configuration, current mandatory assessments include SAGE, ACT, World-Class Instructional Design and Assessment (for English Language students), and DLM (for special education, if applicable). LAU fully intends to follow all proctoring requirements for state testing. The planning and implementation of state testing will be the responsibility of the Executive Director, who may choose to hire an Assessment Director to oversee this responsibility. If families do not want to participate in standardized testing, they will be required to complete necessary exemption paperwork.

This data helps LAU identify annual school improvement opportunities in the areas of instruction, performance on exams, student and parent satisfaction (based on survey data), and professional development. The implementation of a School Improvement Team comprised of key LAU administrators and members of the Williamsburg Educational Services team will drive and generate discussion on progress toward the school's improvement goals.

Grade Level Promotion and Graduation Requirements

Students must complete the courses required of each grade level before passing to the next. In order for a student to graduate from LAU, they must meet the following criteria, which meet or exceed requirements outlined by the Utah State Office of Education as shown below:

Subject Area	LAU Graduation Credit Requirements	Utah State Office of Education Credit Requirements
Language Arts	4.0	4.0
Math	3.0	3.0
Science	3.0	3.0
Social Studies	3.0	3.0
P.E./Health	2.0	2.0
Fine Arts	1.5	1.5
CTE	1.0	1.0
Financial Literacy	0.5	0.5
Technology	0.5	0.5
Electives	3.0	5.5
Leadership	2.5	0
TOTAL CREDITS	24	24

Section Six: Governance

Trustees

The Board of Trustees will be the governing body of Leadership Academy of Utah (LAU). The current Board includes a former director of a Utah charter who is now administering a sister school to LAU in Nevada, a certified Utah teacher who has helped in the early phases of another Utah charter school, a Human Resources expert who helped found the JetBlue Foundation, which is committed to providing STEM education to under-served groups, an accountant who has worked for one of the nation's largest firms, a currently licensed and practicing Utah attorney, a mechanical engineer, and a homeschool mom. Most of these board members are deeply experienced with the Williamsburg model and have children currently benefiting from The Williamsburg Curriculum.

In this section, a brief bio is provided for each trustee, demonstrating their relevant employment and educational backgrounds, as well as their history with nonprofit boards and other relevant experience. Affidavits and Background Information Sheets are included as part of this application.

Busch Jones—Chair: Busch graduated from Brigham Young University in 1997 with a BA in Travel and Tourism, geography emphasis. He has worked for over 20 years in the travel and airline industry, including his current role in talent acquisition in the human resources department of JetBlue Airways. He is a founding board member of the JetBlue Foundation, an organization committed to providing opportunities in aviation and STEM education for underserved groups. Busch is the father of three children, ages 18, 16, and 12. He and his wife have pursued alternative education for their children, including both public and private schooling, and his children have greatly benefited from those alternatives. He is looking forward to the many advantages LAU will bring to his children, other family members, and many other students and families throughout Utah.

Suzanne Christensen—Vice-Chair: Suzanne graduated from Brigham Young University in 2000 with a BS in Sociology, and minors in English and Business Management. She has served in leadership positions in various organizations, notably as a founder and president of United Families Pennsylvania, a board member for the Wharton Kids Club, a contributor to *www.thepowerofmoms.com*, and as a writer and planner for her home education group, *Adventure Learning*. Suzanne is the mother of four boys, ages 3–14. She has used private, charter, and home education for her children. She has coached sports teams, coached a junior high mock trial team, organized science fairs, led a monthly book club for boys, and taught an online world cultures class for 1st/2nd graders. Suzanne has two students using The Williamsburg Curriculum and appreciates the quality instruction and personalized education they receive.

Analisa Fisher—Secretary: Analisa brings needed educational and charter school experience to the board. She graduated from Brigham Young University in 2012 with a BA in French teaching and a minor in English teaching. Since graduating, she has been teaching at a newly-established charter school in Utah County. Though Analisa does not have any children old enough to attend LAU, she is excited to give other children the chance to benefit from the school's program. She believes LAU's model very effectively teaches leadership skills, critical in today's world.

Ben Lindsey—Treasurer: Ben is an accounting professional with a Master's of Business Administration and a Master's in Accountancy from Southern Utah University. Having also received a Master's in Brand Management from L'Institut des Hautes Études Économiques et Commerciales in Paris, Ben brings an international perspective to education that will be valued at LAU. He is a founder and owner of Pacific Trading Company, a dynamic international import and trading company. In his earlier career, he was a key financial auditor and analyst for major corporations, including Hercules in Palo Alto, California and Pricewaterhouse Coopers, one of the nation's largest accounting firms.

Valden Longhurst—Trustee: Valden graduated from Brigham Young University in 1997 with a BS in Electronics Engineering Technology. Since graduation, he has worked in the field engineering local data networks, supporting metropolitan area data and voice networks, and troubleshooting global issues with large companies responsible for carrying major sections of the internet traffic. Currently, Valden is employing his skills to improve the accuracy and understandability of technical documentation. Valden and his wife have educated their children using both public and private education systems. Valden desires to encourage, support, and be

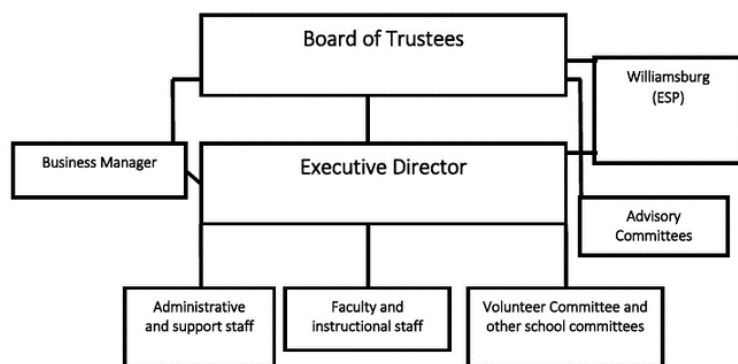
a part of this development in hopes that LAU will provide to more and more children the same advantages that his children enjoyed in a similar model. Valden will be advising LAU in technology, obviously a key component of a virtual school.

Dale Millsap—Trustee: Dale graduated from Utah State University in 1999 with a BS in Mechanical Engineering, aerospace emphasis and Spanish minor. He worked for two years for a small, family-owned hydraulics and pneumatics design/build/service company and then began his current employment at Williams Companies, a Fortune 100 company focused on energy infrastructure. At Williams he is tasked with the development and management of the engineering standards utilized on projects and assets across the company. He also serves as a board member for the Center for Documentary Expression and Arts in Salt Lake City. Dale is the father of eight children, newborn to age 17. He and his wife have custom-tailored their children’s educational opportunities, utilizing homeschool, charter school, public school, and online curricula. His two oldest children have integrated an LAU-type model into their educational portfolio, and he is excited to help create new opportunities for his other children to access this education.

Bryon Richardson—Trustee: Bryon, the Director of a model charter school (Leadership Academy of Nevada), is a key board member because he has actually implemented this program in a public charter school. Bryon holds a Bachelor’s Degree in Sociology from the University of Utah and a Master’s Degree in Educational Leadership from University of Northern Colorado. Prior to his work at Leadership Academy of Nevada, he was the principal at Uintah River High School, a Utah charter school. He brings crucial expertise in compliance standards for charter schools and school boards.

Brian Langford—Trustee: Brian rounds out the board with legal expertise. He received his J.D. from University of Idaho in 2007 after receiving his Bachelor’s degree in Civil Engineering from Utah State University. He has served as a law clerk and practicing attorney in Idaho and is currently an attorney in the Utah firm of MacArthur Heder and Metler in Provo. He also brings vital non-profit and educational experience, having served on the Board of Trustees at Project Read, a non-profit foundation that seeks to improve literacy among adults in Utah County.

Organizational Structure



The above organizational chart demonstrates the reporting relationships that govern the school (the Board), administer the organization and its programs (Executive Level), and carry out the day-to-day operations of the school (instructional and support faculty, staff, and volunteers). The school's faculty staff will all report to the Executive Director, who is the sole employee of the school that reports exclusively to the Board. The performance of all other employees, from the Board's standpoint, with a partial exception for the Business Manager (whether an employee or an ESP) is a reflection on the performance of the director.

The school's ESP, Williamsburg Educational Services, will report to both the Board and the Executive Director. The ESP will provide instructional and support staff (see Sections Seven and Eight) personnel, which individuals will report to and be evaluated by the Executive Director. The overall academic performance of the school's students provided through the curriculum resources will be evaluated by the Executive Director and the Board for effectiveness and the contributions to meeting the academic goals as outlined in this application. The nature of the service with the ESP and the terms of all contracts, will be decided by the Board. Neither the ESP nor any of its employees will have any decision-making authority at the school, but will simply carry out the dictates and directives of the Board and the Executive Director.

The Board will also directly work with a Business Manager, who will coordinate all aspects of the job with the Executive Director but also serve an important function of accountability to the Board. The Executive Director will report on financial matters to the Board, and to the Business Manager, which has a direct link to the Board. The Business Manager will verify the reports' accuracy and act as an independent check on the data given to the Board by the Executive Director. The performance, evaluation, and decisions regarding continued employment or engagement of the Business Manager will be made by the Executive Director with ratification by the Board.

The Board will establish board-level advisory committees made up of Trustees and non-Trustees, including employees, parents, community members, or other volunteers. These committees are not decision-making bodies, but data-gathering, researching, reviewing, and advising bodies, who report their findings and recommendations to the Board for action. These committees will also create a training and proving ground for potential new Trustees. The Executive Director will establish other committees that report to the Executive Director, serving the same purpose for the management side of the school. Those committees will not report to the Board, and any recommendations they may make will be implemented at the discretion of the Executive Director.

A Governing Board

It is anticipated that the members of this Board will serve in their present configuration until such time as the school begins start-up operations in earnest, at which point, the school will engage an Executive Director. (See Employees section of this application for more details on

employment, qualifications, and role.) At that point, the majority of the work of running the school will be carried out by compensated staff, vendors, and volunteer parents of registered students. The Board will transition from doing the bulk of required work on its own to *governing* the work of others. The Board considers *governing* to be an active verb, not just the absence of “management.” Accordingly, the Governing Board will:

- Set goals that establish clear metrics for what the school is expected to achieve—those in this application and others that the Board will set and update annually;
- Establish parameters within which the administration has latitude to conduct its implementation of the school’s program;
- Monitor results of the school’s program in line with the Board’s goals;
- Hold the school’s leadership accountable for the achievement of the goals and for behavior within school policy.

The Board will adopt policies that require the school to comply with all applicable laws, operate with transparency and openness, implement all aspects of this charter application, submit all required reports to its authorizer, and report to the Board on the achievement of Board goals with documentary evidence of academic and financial results.

Further, the Board is aware of its obligations as officers of a public body. The current trustees have been selected and recruited to bring together a cross-section of experience, expertise, and viewpoints. The Board will ensure that new members have experience that will allow the Board to:

- Recognize the Board’s primary obligation to the school’s authorizer, parents, students, and Utah’s taxpayers;
- Oversee and collect reports on the school’s legal compliance and requests from its authorizer, using the authorizer’s Performance Framework as the basis for judging compliance;
- Oversee the management of public funds, and require monthly reports with independent evidence to verify appropriate use of funds;
- Oversee the quality of the educational program and collect assessment and other student achievement data that demonstrates the level of academic achievement and growth;
- Ensure that the school operates consistent with its charter in every respect and achieves the academic goals set here and updated from time to time by the Board;
- Sustain and improve through training its governing capacity throughout startup and then through ongoing operations;
- Include representation from the school’s parent body;
- Include diverse viewpoints and geographic locations to ensure that the Board represents its community, which includes the entire state, well.

Corporate Compliance

LAU will be governed by a Board of Trustees, incorporated as a non-profit corporation in Utah and recognized as a 501(c)(3) charitable organization by the Internal Revenue Service. Leadership Academy of Utah, Inc. has been incorporated specifically for the purpose of operating the charter school. A copy of the school's filed Articles of Incorporation is included with this application. Section III of those Articles lays out the purposes of the organization, which is to operate the charter school authorized by this application. The Board of Trustees will govern the school consistent with this application, state law, and bylaws (attached) that set out the size, makeup, appointment of members to, and procedures of the Board.

The Articles and Bylaws were both adopted in meetings, as shown in the minutes included in this section. The Board will undergo, as required by law, annual training on the open and public meeting requirements of public charter schools and will follow open meetings laws. LAU believes that its deliberations and decisions should be made in full view of the public. LAU will post its meeting agendas and minutes on the state's public meeting notice website as soon as it is legally authorized to do so and will post the same on its own website. The Board will keep records of meetings and both written minutes and audio recordings. It will close meetings only with proper notice and for legally authorized reasons. The Board will continually seek, encourage, and enable broad public involvement in the school's governance with full transparency of its activities. Through the use of technology, the Board is able to meet regularly in various online, virtual meeting rooms. This technology is instrumental in allowing Board members, who reside all across the state of Utah and in Nevada, to actively participate and collaborate in meetings, discussions, and other essential functions.

Evaluation and Accountability

The Board will adopt a calendar by which it will receive reports from the school administration on the following:

- Copies of all reports sent to the school's authorizer;
- Verification that reports required by other state agencies have been submitted;
- Financial statements showing actual data in relation to the school's budget as well as annual reports and financial statements from auditors;
- Reports of progress toward the achievement of Board- and charter-defined goals
- Reports of the school's standing on each measure of its authorizer's performance standards, as those exist at any time;
- Records of formal complaints submitted to the Board according to the Complaints Policy and their outcome;
- Survey results from an independent source of the satisfaction of students, parents, and staff.

Reviewing this data will allow the Board to effectively evaluate the performance of its school leadership by focusing exclusively on *outcomes as measured by accurate data*. The adopted calendar will ensure that the Board receives data and reports on a cycle that coincides with the

data's availability and submission to other parties. The Board will collect this data and annually make a data-driven judgment about the effectiveness of the school's director. This data may lead to either a performance bonus to the Executive Director, a requirement that the Executive Director submit a school improvement plan detailing how any shortcomings will be addressed and improved, or a timely change in school leadership.

Training

Even after the school has gained experience from years of operation and is operating smoothly, The Board understands that new circumstances arise, new members rotate onto the Board as experienced ones rotate off, and laws and expectations change. In addition, the Board's own and industry experience continue to refine expectations and raise the bar for quality performance. Therefore, the Board will continually invest in its own governance capacity.

The Board has two prime methods for achieving, maintaining, and increasing quality governance. First, all new Trustees will be required to complete authorizer-required training modules within their first year on the Board. Second, the Board will work with its authorizer's Mentoring Program as it exists at the time of this application, which provides ongoing board training as part of an overall service package including business services and board development. In addition to participating in system-wide board development activities, the school will also engage either its authorizer's mentoring agency or an independent consultant to analyze and provide specific training to LAU's Board consistent with the goals and standards of this charter application. Initially, it is anticipated that this training will be completed, including the development of a strategic plan, over the course of the school's first year, and then on an as-needed basis as the Board make-up changes and as events warrant.

Background Information Sheets

Bryon Richardson

Name Bryon Richardson

Role with application Board Member

Expertise 18 years in public education

Select the statements that are applicable and proceed as directed:

☐ I intend to become an employee of the school. *Provide your role and the timeline for your transition from the governing board to this role.*

☒ I do not intend to become an employee of the school.

☐ I am related to a person(s) identified as a founding member, governing board member, or administrator (relative means father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law). *Describe all relationships.*

☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: I will lend my expertise gained as director/principal of two charter schools to LAU in hopes of aiding the successful beginning and operation of a solid online charter school option in Utah.

Not-for-Profit History: I have been director/principal of two charter schools for the past 9 years. In this capacity, I have developed the skill sets needed to run an effective and financially-sound charter school.

Employment History: I have 18 years in the education field, ranging from middle school to higher education. Most recently, I am serving as Director at Leadership Academy of Nevada, a state-sponsored virtual charter school in Nevada. Prior to Leadership Academy I was principal at Uintah River High School, a charter school in Utah. I have also worked in youth homes, detention centers, and federally-funded education programs at the University of Nevada, Las Vegas and Utah State University—Uintah Basin. I have taught general education classes at the Art Institute of Las Vegas and Hi-Tech Institute.

Education History: I received my Bachelor's Degree (1995) in Sociology from the University of Utah and a Master's Degree (1999) in Educational Leadership and Policy Studies at the University of Northern Colorado. I continued my studies at the University of Nevada, Las Vegas where I have finished the classes but have not completed my dissertation for a Ph.D. in Sociology with an emphasis in education.

Consent for Background Check: I will have a background check completed

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Leadership Academy of Utah CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Analisa Fisher

Name Analisa Fisher

Role with application Board Member

Expertise Certified School Teacher

Select the statements that are applicable and proceed as directed:

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☒ I do not intend to become an employee of the school.

☐ I am related to a person(s) identified as a founding member, governing board member, or administrator (relative means father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law). *Describe all relationships.*

☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: I intend to use my experience as a teacher to help with the governance of LAU. I have worked at a charter school and know what makes a charter school effective from a teacher's standpoint. I have had communication with many charter school parents, administrators, and teachers, so I know what will be needed of us as a governing board. I am committed to this application, especially the desired outcomes of the school and the curriculum that will be used to reach those goals.

Not-for-Profit History: I worked with my school administration at Aristotle Academy doing the following: helping to resolve personnel disputes, teaching PD classes to the faculty, designing the yearbook, working as assessment director, and designing curriculum.

Employment History:

August 2012–September 2015, Middle School Teacher, Aristotle Academy, American Fork, UT
August 2014–July 2015, Site Director at Boys and Girls Club at Aristotle Academy, American Fork, UT
August 2015–Present, Grant Coordinator, Boys and Girls Club of Utah County, Provo, UT

Education History: Bachelor's Degree in French Teaching with a minor in English Teaching, Brigham Young University, Provo, UT. Level 2 Secondary Education Teaching Licensure in State of Utah

Consent for Background Check: I have a current background check cleared with the State of Utah.

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I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Benjamin Lindsey

Name Benjamin Lindsey

Role with application Board Member

Expertise Finance

Select the statements that are applicable and proceed as directed:

☐ I intend to become an employee of the school. *Provide your role and the timeline for your transition from the governing board to this role.*

☒ I do not intend to become an employee of the school.

☐ I am related to a person(s) identified as a founding member, governing board member, or administrator (relative means father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law). *Describe all relationships.*

☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: I am committed to the establishment and success of LAU and offer my financial expertise to that end. Personally, I hope to see LAU succeed because I, as a student, felt restricted by the rigid learning framework set by my teachers. Had I had an option like LAU, with boundless opportunity and the flexibility of an online environment, I would have been more likely to thrive early on. Later in college I was praised for my unorthodox learning style.

Not-for-Profit History: I have volunteered with the Volunteer Income Tax Assistance program preparing tax returns and offering advice. I've assisted at various women's shelters to provide positive male interaction with women and children. I've helped plan and organize urban renewal efforts in Houston and Paris, France. I volunteer in my local community for events and charities.

Employment History: I have spent the majority of my professional career working in finance. I worked as an auditor at PricewaterhouseCoopers specializing in large publicly-traded companies and venture-backed emerging market startups. I later worked with a venture capital firm providing analytical support and valuation expertise for investment teams. I currently run my own business importing/exporting.

Education History: I graduated from Southern Utah University with a Bachelors and Masters in accounting as well as an MBA. I also have a Masters in Brand Management from L'Institut des Hautes Études Économiques et Commerciales (INSEEC).

Consent for Background Check: I will complete a background check prior to final submission.

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I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Brian Langford

Name Brian Langford

Role with application Board Member

Expertise Attorney

Select the statements that are applicable and proceed as directed:

☐ I intend to become an employee of the school. *Provide your role and the timeline for your transition from the governing board to this role.*

☒ I do not intend to become an employee of the school.

☐ I am related to a person(s) identified as a founding member, governing board member, or administrator (relative means father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law). *Describe all relationships.*

☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: I have been asked to serve as a board member. I am currently an attorney, licensed to practice in Utah and Idaho. My practice focuses on transactional matters in business and estate planning. I am excited to help with this school in this new endeavor.

Not-for-Profit History: I am the current chair on the board of trustees for Project Read, a non-profit organization based in Utah County. Project Read's mission is to provide one on one tutoring to adults in Utah County. I have been a member of that board for three years.

Employment History: I have been a practicing attorney for eight years. Following law school, I clerked for a US bankruptcy judge, Jim D. Pappas, chief judge for the District of Idaho. I then entered private practice, where my focus was on creditors' rights and bankruptcy. Recently I have begun drafting estate plans and handling complex business transactional matters.

Education History: Bachelor of Science, Utah State University, 2004. Juris Doctorate, University of Idaho College of Law, 2007.

Consent for Background Check: I will complete all necessary background checks prior to the submission of the final application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Leadership Academy of Utah CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.

Brian Langford

Applicant's signature

Busch Jones

Name Busch Jones

Role with application Board Member

Expertise Human Resources

Select the statements that are applicable and proceed as directed:

☐ I intend to become an employee of the school. *Provide your role and the timeline for your transition from the governing board to this role.*

☒ I do not intend to become an employee of the school.

☐ I am related to a person(s) identified as a founding member, governing board member, or administrator (relative means father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law). *Describe all relationships.*

☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: As a founding member and current board chair, I am personally invested in the formation of LAU. My wife and I have pursued alternative education over the past 11 years for our 3 children, ages 12-18, including brick and mortar public school, home school, and charter school. They have most recently experienced The Williamsburg Curriculum through a combination of online private school and charter school and have excelled, receiving a high caliber liberal arts & leadership education. They are very engaged in the courses offered, continually comment on exceptional teachers, and have formed quality relationships with students throughout not only Utah, but also the nation and other countries. However, as a parent, it has not been easy to enroll our children in these programs, to sign up for classes, or to stay on top of the many requirements needed to remain enrolled in the charter school. LAU will provide only The Williamsburg Curriculum, making the entire process smooth and seamless.

Not-for-Profit History: I currently serve as a board member for The JetBlue Foundation, a 501(c)(3) organization in its third year committed to providing opportunities in aviation and STEM education for under-served groups and communities across the entire US. As a founding board member, I participated in the development of the foundation's vision, mission, and strategic plan. I have also participated in fundraising and other public board-related activities.

Employment History: I have been with JetBlue Airways Corporation for 14 years. My responsibilities have included talent acquisition, data analysis, revenue management, project management, and opening a new location.

Education History: Bachelor's in Travel and Tourism, Brigham Young University, 1997

Consent for Background Check: I will complete a background check by the final submission.

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I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Dale Millsap

Name Dale Millsap

Role with application Board Member

Expertise Parent/Professional

Select the statements that are applicable and proceed as directed:

☐ I intend to become an employee of the school. *Provide your role and the timeline for your transition from the governing board to this role.*

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☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: I am committed to the establishment of LAU. My wife and I have eight children, from newborn to 17. We have custom tailored their educational paths. Our oldest two have benefited significantly since we integrated The Williamsburg Curriculum into their educational portfolio, and they are receiving a world-class education. They enjoy the lasting relationships they have formed with their teachers and fellow students, and have developed greater sensibilities toward the diverse and dynamic world they live in. I want to make this curriculum more attainable for the rest of my children and for many other families through the establishment of LAU.

Not-for-Profit History: I currently serve as a board member for the Center for Documentary Expression and Art (CDEA), an independent, non-profit organization that creates, supports, and promotes documentary expression, art, and studies through a Major Exhibits Program that builds exhibits with significant national and international human rights themes and a K-12 traveling exhibits program called Exhibits that Teach. I have played a key role in obtaining financial support for several exhibits.

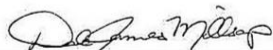
Employment History: I am an engineer, employed by The Williams Company for the past 14 years. I currently manage a group of engineers, and am responsible for highly technical content. I also manage intercompany relationships, and my department budget. My team is located in multiple cities; we rely heavily on technology to stay connected and accomplish our work. I have also been a project manager.

Education History: BS in Mechanical Engineering, Aerospace Emphasis and Spanish minor, Utah State University, 1999. I maintain PE and PMP credentials required for continuous education as an engineer.

Consent for Background Check: I will complete a background check prior to submission of the final

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I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Suzanne Christensen

Name Suzanne Christensen

Role with application Board Member

Expertise Parent

Select the statements that are applicable and proceed as directed:

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☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: I intend to develop a quality distance learning option in Utah that utilizes the power of community in extended learning opportunities. I have extensive experience in planning, organizing, and executing various programs and events. As a parent, I am a committed team member with a desire to help parents and students in Utah utilize innovative educational opportunities.

Not-for-Profit History: 2004-05 Treasurer/ Event Planner, Wharton Kids Club Board, Philadelphia, PA; 1997-98 Executive Director—Community Service Ongoing Programs, BYU Student Association, BYU, Provo, UT; 2004-05 President, United Families Pennsylvania, United Families International. I started this state chapter, including advocating, educating, and speaking on behalf of families at various events throughout the state; 2011-12 Montessori Academy Parents Association, Maria Montessori Academy, North Ogden, UT

Employment History: 1999-2000 Marketing Director, Honeyville Grain, Inc., Salt Lake City, UT
2000-Current: I have stepped away from the professional workforce to stay at home with my children.

Education History: BA in Science and Sociology, minor in English, Business Management, BYU, Provo, UT, 2000

Consent for Background Check: I will complete a background check prior to the submission of the final application.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Leadership Academy of Utah CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Valden Longhurst

Name: Valden Longhurst

Role with School: Board Member/Trustee

Expertise: Electronics Engineering/Information Technology

Select the statements that are applicable and proceed as directed:

☐ I intend to become an employee of the school. *Provide your role and the timeline for your transition from the governing board to this role.*

☒ I do not intend to become an employee of the school.

☐ I am related to a person(s) identified as a founding member, governing board member, or administrator (relative means father, mother, husband, wife, son, daughter, sister, brother, uncle, aunt, nephew, niece, first cousin, mother-in-law, father-in-law, brother-in-law, sister-in-law, son-in-law, or daughter-in-law). *Describe all relationships.*

☒ I am not related to a person(s) identified as a founder, governing board member, or administrator.

Statement of Intent: My understanding of this role and personal statement of intent is to advise in the technology area using my skills and education.

Not-for-Profit History: I have volunteered for the Boy Scouts of America, The Church of Jesus Christ of Latter-day Saints, and various community organizations (staff member for Special Olympics, instructor at English Language Center, and others). I received no monetary reimbursement for these volunteer hours—only personal satisfaction. These teaching experiences outside of technology as well as other life experiences have reinforced my understanding of the increasing need for a solid education involving key elements: strong leadership skills, a willing attitude for bi-directional communication, practical knowledge in the sciences, an ability to effectively use current technology, a respect for engineering principles, and a pressing need to both understand and apply math beyond simple mathematics.

Employment History: President/owner of a small and successful sole proprietorship, operated within solid fiscal principles. Duties include: Communication and Network Systems Engineer, Director of Operations, Network Engineer, and Network Administrator

Education History:

I have an Associate degree in Electronics Engineering Technology from BYU-Idaho (1994), and a B.S. in Electronics Engineering Technology from BYU-Utah (1997). I am a Red Hat Linux certified engineer and I am certified by the Linux Professional Institute.

WITH THE SIGNATURE BELOW, PERMISSION IS HEREBY GRANTED TO VERIFY ANY INFORMATION PROVIDED ABOVE FOR Leadership Academy of Utah CHARTER SCHOOL.

I AFFIRM THAT THE INFORMATION PRESENTED HEREIN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



Applicant's signature

Section Seven: Staffing

Structure and Operation

LAU will operate under the structure outlined in Section Six. The Board will govern the school by holding the administration and staff accountable for the achievement of goals and operation within law and policy. Authority to organize the school and manage all its aspects (again, within school policy and state law towards the achievement of Board goals) will be delegated to the school's Executive Director.

The Executive Director will select and hire staff to fill every position at the school save the Business Manager, which will be chosen jointly with the Board. With complete authority to hire, train, discipline, and terminate employees and to change the assignments and structure of the school, the Executive Director will be fully accountable to the Board for the school's academic, financial, and operational results. (The Board will, in turn, be fully accountable to its authorizer for the same). All faculty and staff will be hired on an at-will basis. No employee will have employment contracts of any length (with the potential exception of the Executive Director).

This section describes the Executive Director's qualifications and responsibilities in detail, including the Board's plans to recruit and select the best candidate. Further, the Board's plan for school staffing is outlined here, tying positions and structure to the school's mission and program as described in this charter application.

Executive Director

The school leader will be called the Executive Director and will report to the Board. The Executive Director's performance will be evaluated by comparing the school's performance to that of the goals set in this charter, the authorizer's performance standards, and any other goals that the Board may set from time to time. Additionally, the Board will monitor the school's and Executive Director's behavior for compliance with school policy and relevant state and federal laws and rules.

The Executive Director, supported by Williamsburg Educational Services (See Appendix E: ESP Contracts), will be responsible for managing the educational program consistent with this charter application. That management will include:

- Working with Williamsburg Educational Services to ensure that the curriculum is implemented consistent with the school's mission goals as outlined in this charter application
- Evaluating instructional program effectiveness including the performance of all educational program staff
- Ensuring that all employees follow state and federal law, Board policy, and this charter application in implementing the program
- Implementing an effective process for the collection and interpretation of student achievement data
- Developing required plans for state- and federally-funded programs

- Monitoring the effectiveness of the ESP and the virtual curriculum
- Ensuring that parents are properly engaged in their children's school experience and support student achievement with out-of-school engagement
- Overseeing the special education program and acting as the LEA-representative in the development of IEPs
- Ensuring that general education faculty and staff are trained in providing appropriate accommodations to students with disabilities according to each student's IEP
- Coordinating the professional development of all teachers and ensuring that all are properly licensed and that no one whose educators' license has been suspended or revoked is employed by the school
- Regularly observing online instruction and student-teacher interaction

The Executive Director will also be responsible to **manage the school's finances and operations**, which will include:

- Proposing a budget and financial plan to achieve the educational program goals within available funding resources (in collaboration with Business Manager)
- Operating all aspects of the school within the approved budget and consistent with the authorizer's financial standards
- Ensuring that proper financial protocols and procedures are followed to protect the school from waste and fraud
- Documenting the school's processes to ensure continuation of school operation in case of the Executive Director's absence or turnover
- Following state purchasing policy in all procurement
- Operating within state and federal law and board policy in all aspects of school operation
- Submitting required reports to the authorizer and other relevant state agencies
- Creating a positive culture for the faculty and families in the school community.

In seeking a candidate to fill this most critical of positions, the Board will seek a candidate who possesses:

- An entrepreneurial spirit that embraces creativity and dedication
- Three years' experience in charter school operations, with a preference for experience in virtual educational settings
- Knowledge and understanding of state academic, finance, and governance standards
- Effective management skills that focus on positive, effective motivation for faculty and students
- Ownership of individual performance and of the performance of those under his or her authority

Because this position has not yet been filled, the Board, upon charter approval and receipt of funding to properly compensate a quality Executive Director, will engage in a nationwide search

for the Executive Director. The Board anticipates advertising the position using all effective avenues, such as teachers-teachers.com, the iNACOL (the nation's online learning consortium) job board, employment and educational networks of the ESP, attendance at online learning and charter school conferences and job fairs.

Applicants will be divided into three categories of quality—high, mid, and low. A reasonable (probably around six) number of high- and potentially mid-ranked candidates will proceed through a three-phase interview process. That process begins with a board hiring committee interview on educational philosophy and experience. The top several candidates will then be interviewed for a second time by the same committee to determine appropriate temperament, operational knowledge, and “fit.” Finally, the top two (at a minimum) candidates will be interviewed by the Board, which will make the final selection.

Administrative Leadership and Support

The responsibilities and skills listed above under the Executive Director section are really the totality of the responsibilities performed and skills needed by the school administration as a whole. While it is theoretically possible to find a single individual who possesses all these skills in equally great measure, it is more likely that the Board will select an Executive Director who is strong in some areas and wanting in others. An important attribute for the Executive Director will be a recognition of his or her own strengths and limitations and a willingness to address limitations by selecting a support team of strong leaders who properly complement the Executive Director's own strengths.

The specific structure of additional administrative support staff will be determined by the Executive Director based on the specific skills that he or she brings to the job. It is possible that the Board will select an Executive Director with strength in teacher development and training but who is not as strong in data analysis. In that case, the Executive Director will likely hire a support team that includes a data specialist. A different Executive Director may need help with teacher training.

Because LAU's Board will hold the Executive Director accountable for the school's performance, the Board will empower the Executive Director to identify the key areas of need, draft job descriptions for those positions, and make appropriate hires.

The Business Manager has specific board-directed responsibilities, so the Board will ensure that the chosen candidate for that position has the following skills:

- A commitment to succeed according to the terms of this charter
- The ability to handle multiple tasks, high stress and frequent deadlines
- The ability to maintain confidentiality in all aspects of the job
- Knowledge of accounting systems and requirements for public schools in Utah

The Business Manager will be expected to fulfill the following responsibilities:

- Adhere to school and administrative policies in all aspects of school operation and finance
- Compile and prepare a variety of reports as required by law and requested by the Board, the school, or the public
- Identify and correct deficiencies within school procedures or systems relating to school operations
- Establish, maintain, analyze and evaluate accounting practices, systems, and controls that result in clean audit reports
- Properly account for the use of restricted local, state, and federal sources of revenue
- Reconcile and manage all school accounts, including bank and purchase card accounts
- Process all financial transactions following state and school purchasing policy and rules
- Prepare school financial status reports for the Board and authorizer as requested
- Keep accurate employment records of all school employees, including required electronic records and databases
- Complete regular payroll, including collection of time cards, calculation of deductions, and payment of employees, and benefit providers, along with associated taxes
- Administer employee benefit plans and coordinate with benefit providers; work with the Board and Administration in developing benefit plans as necessary

Staffing and Recruitment

Staffing Plan - For illustration purposes, this subsection lists administrative, support, and instructional positions that will be the staffing foundation on which LAU will build. As explained above, the Executive Director has the authority to change the administrative and support structure consistent with his or her own strengths and those of the rest of the administrative team. Therefore, the below listed staffing plan, which begins from the “bottom” (in a sense of organizational chart-placement, not of importance), is subject to modification as the needs of the school dictate. The positions listed below are in addition to the Executive Director and Business Manager positions listed above.

The school will engage the services, through the ESP, of a substantial number (the specific number will be based on student needs and progress) of **paraprofessional instructors**. These instructors will monitor student engagement and progress within the educational program. Coordinating with teachers, they will provide one-on-one and group instruction and support to students, including to students with disabilities or who are academically at-risk. Instructors report to the school’s administrative team, led by the Executive Director, who will make all assignment, retention, training, and disciplinary decisions.

Teachers (often referred to as mentors) make up the core of LAU’s instructional team and are the backbone of student achievement, for, without quality teachers, high levels of student achievement will not exist. Therefore LAU will employ highly-qualified, licensed teachers to

provide group instruction in core courses, to oversee paraprofessional instructors, and to ensure that all students make adequate academic progress toward achieving their personal goals as well as those outlined in this application.

LAU's teachers are compensated in a unique and innovative way. Teachers are compensated based on the number of student-sections taught, rather than a simple flat amount for full- or part-time work. More student-sections will mean that a teacher is working longer hours, so there is correlation, but the amount of compensation is based on enrollment, not time. That allows tremendous flexibility for the school's budget. As enrollment increases or decreases, the cost of teachers also fluctuates, so LAU will not face the same fixed costs that more traditional schools, even some virtual schools, face in budgets. (See Section Eight for full budgetary impact and details.)

The school's **Special Education Director** will oversee the instruction of students with disabilities and related compliance matters. This position will oversee the implementation of all Individual Education Plans, identify students who may qualify for such plans, train the faculty and administration on special education compliance and practices, and provide instruction according to students' IEPs. This position reports to the Executive Director.

The Executive Director will likely hire two **Executive Director's Assistants** who will coordinate the day-to-day operation of the school. Assistants will act as the custodians of student records, oversee compliance with state and federal privacy laws, and coordinate the transfer and receipt of records with other schools. Additionally, the assistants will coordinate the school, as well as the Executive Director's, calendars, and serve as the school's receptionist and office manager.

Because LAU will serve secondary grades, the school will employ a **Counselor**, who will have the responsibility to coordinate student schedules and credits that align with individual goals and plans. The counselor will ensure that students complete necessary credit requirements for graduation and have access to all state and school resources and options in public and higher education. Further, the counselor will provide individual counseling to students as required by IEPs or as otherwise needed.

Finally, the Executive Director will likely hire one **Assistant Director** with responsibility to assist the Executive Director with specific aspects of school administration. As explained above, the specific tasks and responsibilities may change, but it is likely that the Assistant will have a mix of teacher training and monitoring, student management, public relations, parental support, and compliance monitoring functions. This position reports to the Executive Director, who is ultimately accountable to the Board for the school's overall administrative function and educational performance.

Qualifications and Skills

Leadership Academy of Utah will ensure that all its employees are vetted for high quality, legal qualifications, philosophical alignment with the school's charter, and a work-ethic and independence conducive to success in a virtual work and educational environment. Further, LAU will ensure that background checks are conducted for every employee and for every volunteer who has significant unsupervised access to students and will not employ an educator whose license has been suspended or revoked by the Utah State Board of Education.

On a position-by-position basis, LAU will seek candidates who have the needed qualifications and skills in an appropriate mix as listed below.

Paraprofessionals:

- Experience in an educational setting
- Bachelor's degree in a relevant field (at high school level; prior to grade 9, instructors may still be working toward a degree)
- A skill set that lends itself to teaching and presenting online
- Engaging and inspirational qualities and personality

Teachers:

- Valid Utah Educator's License or approved alternative for each specific assignment
- Experience providing instruction in a virtual environment
- Ability to work independently and accomplish tasks with minimal direct supervision
- Demonstrated knowledge in subject area
- Ability to relate to and inspire students

Counselor:

- Valid Utah Educator's License or approved alternative for specific assignment
- Three years' experience in public education, preferably in a virtual environment
- Ability to work independently and accomplish tasks with minimal direct supervision
- Ability to relate well to teenagers
- Knowledge of Utah's core, graduation, and college entrance requirements

Special Education Executive Director:

- Valid Utah Educator's License or approved alternative for the assignment
- Three-years' experience as a special education teacher, ideally in a charter school or a virtual education environment
- Master's Degree

Executive Director's Assistants:

- A high level of personal and professional organization
- Three-years' experience in a school office setting

- Knowledge of FERPA and other privacy regulations
- Proficient with office suite software
- Type at least 50 words per minute
- Pleasant demeanor and an attitude of customer service

Assistant Director:

- Bachelor's degree in education or a related field with a Master's degree preferred
- Three-years in educational leadership, preferably in a virtual or charter environment
- Knowledge of Utah's core curriculum requirements and of virtual and charter school accountability requirements
- Ability to handle multiple tasks and prioritize to meet multiple deadlines
- A high level of personal and professional organization

Recruitment Plan

Recruiting teachers for a virtual school requires a different approach. Easier in some ways, because geographical boundaries are less applicable, but more difficult because few teachers are trained in virtual curriculum delivery as they earn their educator's license in a traditional college setting. Dealing with those two realities, LAU's recruitment strategy will maximize the nationwide pool of candidates while targeting specifically those with virtual teaching experience. The strategy may include the following steps:

1. Use the ESP's nationwide public and private school contacts to identify potential candidates to recruit.
2. Attend local teacher hiring fairs as an employer to identify candidates who have a desire for the flexibility and schedule offered by a virtual education environment.
3. Use national job boards, especially teachers-teachers.com, provided free to Utah's public schools, to cast a wide net with a specific focus.
4. Virtual schools are particularly attractive to families that have educated at home in the past, so LAU will reach out to home-school associations, networks, and conferences to identify qualified potential candidates among that group.

LAU's model will require a fairly large *number* of teachers, even though the school's Full-time Equivalent count (see the budget in Section Eight for details) is quite low. The nature of the school's pay structure described above and in Section Eight will lead to several part-time teachers who are subject-specific. Our research has shown that there are large numbers of qualified candidates looking for just this kind of situation—work at-home for part-time hours to supplement income. In fact, Leadership Academy of Nevada has a surplus of applicants, which LAU will recruit (as identified in step 1 above) for interviews and potential hire.

This teacher recruitment plan in all its aspects will be an effective way to recruit the faculty needed to implement the program outlined in this application and within the budget in Section Eight. The plan is low-cost, multi-faceted in scope, and targeted to our preferred candidate

pool. Once on board, teachers will be extensively trained in the school’s educational approach and philosophy and then held accountable for performance.

Professional Development

Most of LAU’s professional development will occur during in-house (that is, a virtual house) training with the school’s faculty, led by the ESP. Training occurs at weekly training sessions that focus on the key aspects of the school’s educational program. A comprehensive professional development plan is outlined in Section Four, Online Learning subsection.

In addition to the training that the ESP provides in these specific areas, the school will ensure that teachers hired with a Level 1 license or who achieve licensure through a state-approved alternative will have quality support from experienced teachers. Every week, each teacher will report to a “team leader” (who is an experienced teacher) for both support and accountability. While it is anticipated that LAU may need to use some alternative methods and hire some early-career teachers in LAU’s first few years of operation and growth, the school will first seek licensed educators, and will ensure that sufficient faculty exist at higher licensure levels to assist newer teachers through the state’s Early Years’ Enhancement (EYE) Program. LAU will use available Title II funding to provide professional development and appropriate Early Years’ Enhancement plans to increase the number of Highly Qualified teachers.

Retention and Accountability

LAU’s research has shown that personal and professional growth, is a key aspect of keeping quality teachers and improving their effectiveness.²⁰ Therefore, the comprehensive training and new teacher immersion program, supported by experienced mentor teachers and a vastly experienced ESP, make up the core of the school’s retention strategy. The study cited in the footnote above notes that teacher autonomy, small school size, and basing compensation on performance and outcomes (rather than simply years’ of experience) are all effective retention strategies. All are part of LAU’s approach and structure.

LAU will use student achievement data not only to gauge overall school effectiveness (see Sections One through Five), but also to focus training and compensation where they will have the greatest impact. Teachers whose data demonstrate increased effectiveness on student outcomes will receive additional compensation commensurate with their performance. Teachers whose data show areas of needed improvement will receive specific training and professional growth plans.

Teachers who do not make adequate progress under professional growth plans or toward achieving or maintaining highly-qualified status will go through a progressive discipline plan. Such teachers will receive coaching from mentor teachers and administration and be given

²⁰ <http://files.eric.ed.gov/fulltext/ED477648.pdf>

reasonable time to demonstrate improvement. Teachers who fail to make that progress in a reasonable time, however, will not be retained.

Growth with the School

The staffing plan outlined in this section is broadly stated to be practical and applicable for all phases of school growth. Because this charter application seeks to grow student population over a three-year period, the number of employees will grow over that time, but the structure will not materially change.

For example, it is anticipated in the first year with only 280 students, the Counselor and Assistant Executive Director may be the same person filling two roles. As enrollment grows, that position may divide and be filled by two. As student population grows, the number and student-section hours of teachers will increase, as reflected in the budget in Section Eight. The number of Executive Director's Assistants may also increase as enrollment grows and the "registrar" and "reception" responsibilities both take more time. This growth is reflected and explained in detail in Section Eight.

Section Eight: Business Plan

The foundation of Leadership Academy of Utah's business plan is based on the knowledge that the school will be funded with dollars from hard-working Utah taxpayers. They make that investment expecting that LAU will spend the money legally, transparently, and efficiently and will accomplish the goals outlined in this charter application. LAU will use public funds to accomplish the mission and achieve the goals in this charter consistent with state laws and regulations governing public education.

Key Budget Assumptions

A budget is the mission of the school in numerical form. At every step of the budgeting process, the Board weighed the school's mission, vision, and purpose as contained in this application. In the budget below, LAU prioritizes the unique aspects of its educational program, ensuring that the charter's vision is supportable with the public funding available to LAU and its students.

The budget template for the first ten years of operation, in required Excel format, is submitted with this application, as directed in the application instructions checklist.

Implementing the LAU program

LAU's budget will look different than many other charter schools'—even different than many other virtual charter schools. Our unique staffing model builds upon the use of technology to reduce labor costs. Our substantial training investment helps teachers have a greater impact in the education and lives of students. That unique approach can be seen throughout the budget.

Planning Year - As the school begins its planning and start-up year, the available grants, loans, and other funding will support the development of the tools that will ensure that the program

and charter are implemented with fidelity once school begins. Specifically, funding in the planning year will support:

- An **Executive Director**, who has not been identified, who will spend the planning year building the academic program, hiring faculty and staff, building the policy framework for legal compliance upon operations, and working with the ESP to establish academic delivery systems and recruit students. A full description of this position's duties and qualifications can be found in Section Seven.
- An **Office Manager/Executive Director Assistant**, who will oversee and track student records and enrollment and coordinate public relations events for prospective students. The Office Manager will establish the school office's organizational structure so it will be ready to receive students, employees, and state officials during the start-up year and school operation.
- Funding is also budgeted for the support of an administrative service assistant, who may be an individual or a firm, contracted for a short duration to assist with the establishment of charter school best practices in Utah. This service assistance will help the Executive Director establish policies, set up payroll and benefit systems, coordinate purchasing, and establish compliant operational procedures.
- The school will begin occupying a small office space, which will continue to serve as the school's headquarters once school opens. The office space will need to be 1,200 to 1,500 square feet, and the school has budgeted between \$15 and \$18 per square foot per year - respectable office space at a reasonable price. It is anticipated that the school will occupy such space for only about six months in the start-up year.
- The school will purchase general liability and property insurance (though the school will own little property, especially in the first year.) This insurance will protect it and taxpayers from loss due to unforeseen circumstances such as accidents, crime, or fraud.
- Most of what will be insured from a property standpoint will be the executive office furniture and equipment and technology equipment purchased during the planning year for use in the operational years.
- LAU anticipates that the bulk of the available start-up grants (budgeted at \$100,000 in the start-up year) and loans (budgeted at \$200,000) will be spent on technology, particularly for students. Student technology, spread over two years, is budgeted at \$800 per student. This funding will purchase each student a quality laptop computer capable of running the dynamic multi-media curriculum that is part of the school's academic program. LAU anticipates providing computers, at a minimum, to students who qualify for free or reduced lunch, and to families who have multiple students attending LAU. Additionally, each computer will come with a service and support package so that students, when using computers, have access to specific technical support from the computers' manufacturer. The bulk of these computers will be purchased in advance in the start-up year, with additional purchases made at the beginning of the first operational year based on actual enrollment (see both Operational Years and Break-even subsections below).

- Technology for faculty, also budgeted at \$800 per computer for five machines, is included in the technology budget.
- Marketing is not included as part of this start-up year budget, which is likely a major difference from other start-up year schools. Our agreement with the ESP includes marketing services as part of the service agreement, so the cost of marketing the school to students is captured in the operational years as part of the ongoing cost of the ESP's academic and student services.

The school's administration, with the above tools, will have LAU in prime position to educate 285 students as the school opens in 2017, supported by the operational budget narrated below.

Operational Years - The school will continue to invest its dollars to support the program outlined in this charter. As the school operates, LAU will have higher expenses than many other schools in equipment and purchased services, as the school provides students with the technology and digital support needed for success in LAU's digital program. However, that will be balanced by significantly lower personnel and facility costs, which, by the very nature of learning in a digital environment, is enhanced and extended (teachers can impact many more students when supported by fully-developed virtual curriculum) or made obsolete (there is no need for a central school building, when students take classes in digital classrooms from their own homes). The school will invest heavily in instructional technology for use by both faculty and students. More specifically, the operational year budgets include:

Revenue

- State and federal revenue based on the provided funding worksheet plus anticipated funding under Utah's three-year start-up grant for new charter schools.
- Local funding for student activities based on a budget of \$50 per student. According to 2014 data, Mountain Heights Academy and Utah Connections Academy both had local revenue of several hundred dollars per student, so this smaller estimate is conservative and realistic for a virtual school.

Faculty and Staff

- A Special Education Teacher will oversee the instruction of students with disabilities according to each student's IEP. The school has budgeted \$35,000 for Student Support Services (line 21.300) to cover additional costs of students with disabilities. These costs are difficult to predict, since enrollment in the school is random, but this amount is consistent with the service level of both virtual and non-virtual charter schools in Utah for Special Education on a per-student basis.
- General Education Teachers are licensed educators and provide instruction, modeling, and mentoring to all students at LAU. The number of teachers on staff is small, even when compared to other virtual schools because of the added impact that Instructors (see below and Section Seven) and the curriculum provide to students. Teachers are responsible for the academic progress of a number of students based on the sections they teach. Each teacher teaches 25-35 students for six sections per day, with compensation based on the number of

full sections taught. A great advantage of this compensation approach is that it provides tremendous flexibility in the event of lower-than-anticipated enrollment (see Break-even scenario below). For purposes of this budget, LAU assumes a total of 4.67 general education teachers. (That's more than the formula calls for, but our approach is to be conservative in case anticipated needs of individual students require a more robust teacher faculty.)

- Teachers are supported by an administrative team (the Executive Director and Office Manager), who will administer all educational and student programs, including teacher development, program quality teacher accountability, and charter fidelity. The administrative team, once school operates, will also include:
 - An additional administrative assistant who works under the Office Manager and assists with reception, student records management, office organization, and public relations;
 - An Assistant Executive Director, who will also serve as the school's Counselor in the first year, with those positions split in future years as enrollment grows.
 - A Business Manager who will oversee the school's financial and business operations.
- While the overall structure of the administrative and instructional faculty and staff stay the same, the numbers in each position will grow commensurate with enrollment. Obviously, the number of administrators and assistants will increase along with the Counselor position and FTE count to maintain state compliance with an appropriate counselor-student ratio.
- Full-time employees will be eligible for generous retirement and medical benefits. The costs for this category are lower than most schools because LAU's instructional faculty will be part-time. (Benefit categories that reflect lower percentages of salary as a cost are pro-rated for the number of benefits-eligible employees.)

Education Service Provider (ESP) - The school's ESP is explained in full detail in Section Nine.

For budgeting purposes, the different services provided by the ESP are broken out by function and object, as follows:

- Instruction Services (10.300): The ESP will provide LAU with a cadre of paraprofessional instructors who will extend the reach of LAU's own teachers in student instruction. Of course, all instruction provided by the ESP and these instructors is under the direction of the licensed educators who oversee all instruction (see Section Seven). This section also includes the cost for each student (at \$440 per student) of a robust outdoor leadership seminar (see Section One).
- Professional Development (see Section Four for a description of LAU's intensive Professional Development program) takes a large share of the ESP fee, as shown on line 22.300 of the budget. LAU believes that one would be hard-pressed to find a school that invests more heavily in the professional development of its instructional staff.
- Administrative Services are an ESP function, particularly in the realm of compliance, marketing, and quality assurance. These are broad functions best captured here, in line 24.300.
- In lieu of "textbooks," LAU will use a comprehensive online project-based and leadership-enhanced curriculum, which is shown on line 10.641.

All of these expenses are a key component of the school's charter. They continue from year-to-year and grow commensurate with enrollment. (They also fall commensurate with enrollment, bringing LAU tremendous flexibility—see Break-even scenario below.)

Purchased Services

Beyond the ESP, several other services are included in the school's operational budget.

- An office and administrative facility (described above and below) to house the small administrative support staff, along with a small amount to pay for its ongoing janitorial services, which will be minor based on the number of occupants and its size.
- Basic costs of doing business, including ongoing property and liability insurance (45.500), telephone, Internet, and website costs, annual financial procedures and audits, and basic administrative travel expenses (24.530).
- Incidental per diem costs of travel (24.580) (although little to no travel is required for instructional personnel who undergo training and provide instruction in a virtual environment.)
- LAU does provide significant funding for "Student Activities"—events that allow our virtual students to come together for social events and activities several times per year. The \$20,000 in line 21.540 represents the school's costs for the rental of temporary facilities, catering, or other activities that will be incurred to build this aspect of student life.

Supplies and Equipment

The vast majority of school investment in supplies and equipment is for the online curriculum and student-use computers to access that curriculum, along with other minor expenses.

- Budgets for the purchase of electronic copies (much less expensive) of books (22.644) to build the school's library. Much classic literature appropriate for secondary education is in the public domain and is available free to schools and students, and those titles will make up at least half of the school's virtual library. Because the books are electronic, having one "copy" checked out to a student doesn't limit the ability of any other student to read the same book. It is another way that virtual education leverages technology to reduce cost.
- The budget also includes small amounts to furnish the administrative office space with office and janitorial supplies consistent with occupancy and size.
- Spread over the start-up and first operational year, the school will invest in \$15,000 of office furniture and equipment (24.700 and 24.733). This amount will provide workspace and storage for the initial five administrative employees. That investment continues in the next two years as enrollment and the administrative support team grow.
- The largest investments are in technology, with a total of more than \$220,000 invested in student and teacher-use computers (10.734) as described above. These investments continue at \$800 per student and teacher in future years, with additional funding set aside in the budget to ultimately replace each computer every four years and to provide for ongoing warranty, support, maintenance, and, if necessary, early replacement of the machines.

- Administrative technology (24.734) includes, for each administrator, a computers with office and accounting software as well as a central server for email and document storage (curriculum is stored on ESP-servers), wireless infrastructure and other central technology (phones, copier) at the administrative office. Total cost for this is budgeted at \$21,200 over the first two years. As with instructional technology, the budget takes into account the growing and short-term nature of this equipment, which will need to be augmented, serviced, and ultimately replaced, so the budget in future years continues investment in these categories to ensure that all faculty, staff, and students have continual access to sufficient technology to implement and succeed within the program outlined in this charter.

Other Expenses

- The budget includes funding to join the Utah Association of Public Charter Schools, so that LAU can add its voice to the combined charter school movement as charter schools all work together to protect the chartering environment in Utah.
- Finally, the budget includes repayment of the only debt the school will incur (see Debt subsection below)

Break-even

Contingency planning is a necessary part of any new enterprise. That is why the school has prepared a break-even budget scenario, to identify the minimum number of students required to run the program outlined in this application in a fiscally responsible way. It is also why the school has selected a model that provides tremendous flexibility to reduce cost commensurate with enrollment, as described below.

LAU's contingency budget protects key aspects of the mission and educational program, though at sometimes lower amounts consistent with the financial realities presented by low enrollment numbers. The contingency plan makes the following changes:

- Assumes enrollment is 129 students, 46% of capacity, with younger grades predominating.
- Local, State, and Federal revenue fall in line with actual enrollment as the laws affect each specific program.
- Administrative support falls from an FTE count of 5.67 to 3.15.
- The school counselor's hours will be reduced but will still exceed state-minimum standards.
- The number of teachers falls in line with enrollment, with the exception of Special Education, which will still have one Full-time Equivalent.
- The costs of the ESP for all services falls consistent with enrollment, since the ESP agreement calls for compensation based on the number of students served.
- Benefits stay largely the same, but costs fall as FTE count falls.
- Occupancy expenses stay the same, since the office space will be chosen and occupied prior to school opening. The cost of janitorial service and supplies will fall with lower

occupancy and with more internal work being done by school employees instead of a hired service.

- Insurance and communication costs remain the same.
- Student activities fall with fewer students participating.
- Travel will be reduced with more virtual meetings and virtual attendance at state meetings.
- Property costs fall in the first operational year, since the equipment purchased in the start-up year will be more than sufficient to provide the lower number of enrolled students with technology. Since most of the computers and tech is purchased before the school opens, equipment originally purchased for student use will simply be repurposed at no additional cost.

These plans still protect the school's unique program. The school will invest its more limited resources in this scenario to put forward a quality program, while still building financial viability for the long-term.

Debt

LAU has no plans to incur direct debt to acquire a facility. The only debt the school plans to incur is the State Charter School Revolving Loan, which is available to LAU to pay for start-up expenses during the planning and first operational year. The school intends to borrow \$200,000 to provide additional financing (with the State Start-up Grant) for the planning year and to acquire the necessary technology, and equipment to begin school in 2017. The school has budgeted \$52,475 per year in debt service to repay this debt over the four years of operation as the repayment provisions of the program require.

Systems and Procedures

The school's Board has adopted a comprehensive set of finance policies consistent with Utah Code. These policies cover use of funds, internal controls, purchasing, bank accounts, signatory authority, and every other aspect of financial management and are included with this charter application. Please see these policies for specific details on how the financial controls and procedures at LAU will work on a day-to-day basis.

The principles behind those policies will guide the school in all financial management and transactions. These principles are based on the school's legal financial obligations, generally-accepted accounting practices, and common sense measures to ensure openness, integrity, and value within all financial transactions. Those principles are:

- Segregation of duties so that multiple people are involved each time money changes hands to reduce the likelihood of fraud
- Oversight by regular internal (a board finance and audit committee) and external (an independent auditor consistent with LAU's Local Education Agency status) methods
- Internal review each month with the board finance and audit committee, which samples transactions for compliance with school finance policies

- Transparency in budgeting and spending, with all transactions and budgets posted online as required by law
- Competitive bidding for large projects, including the current and any future ESP according to state purchasing rules, to ensure fair treatment of all and best value for the school and taxpayers
- Proper authorization, ensuring that all expenses are known and approved by the Executive Director and Business Manager beforehand so that authority to spend money is tied directly to accountability for the school's budget.
- Protection of the school's assets with accurate inventory records, duplication of data, holdings spread across multiple banks, and insurance to indemnify employees, the Board, and the school from tort claims

For example, the school will spend money on school supplies or classrooms. The procedure outlined below is similar to the procedures in all aspects of school finance, from receiving money to spending money, and proper accounting of all aspects. (Please note how at least two parties and documentation are involved each time funds change hands.)

Scenario One: A Donation

1. A parent wishes to make a donation to the school. At a school event, the parent gives \$20 cash to the Office Manager, who writes out a duplicate receipt, providing one copy to the parent. Money goes from the parent to the school, with two people involved (parent and secretary) with documentation (receipt) of the transaction viewed by both parties.
2. The Office Manager keeps an electronic log of all such transactions and prepares a deposit on a schedule consistent with state law. All funds are counted and compared to the electronic log and the duplicate receipts. When totals match, the deposit is reviewed by another administrator for accuracy and initialed.
3. The Office Manager (or another administrator that is not the Business Manager) takes the funds to the bank, where a receipt is collected that matches the amount on the school's internal records. Again, two people (bank teller and school administrator) are involved when funds change hands with documentation (receipt and deposit log) kept by both parties.
4. The Office Manager gives the deposit log and receipt to the Business Manager for input in the school's accounting system and for comparison to the bank's online records.
5. The Business Manager reconciles the account, noting that the bank statement agrees with the school's internal records. The Business Manager provides a copy of the reconciliation and original bank statement to the school's finance and audit committee.

Scenario Two: Teacher Purchase for Student Activity

1. A teacher determines a need to purchase an outdoor game for a student activity. She searches online for options and compares prices, including one local vendor to potentially save on shipping costs. The teacher completes a requisition form, signs it, and emails it to the Executive Director.

2. The Executive Director reviews the purchase request, including the documentation on pricing and the rationale for the purchase, and signs approval for the item to be purchased, giving the form to the Office Manager for potential purchase. (If the game is better purchased directly by the teacher for the sake of expediency, step three will be skipped.)
3. The Office Manager places the order, assigning it a purchase order number according to school policy.
4. When the game arrives with a packing slip (prepared by the vendor), the Office Manager (or potentially the teacher, if shipped directly there) will count the items, compare for accuracy to the original order and packing slip, and initial for accuracy or call the vendor in the case of inaccuracy.
5. Initialed packing slip (or invoice) will be attached to the original purchase order (or requisition form, if the teacher purchases directly) and submitted electronically to the Business Manager for payment.
6. The Business Manager reviews all paperwork for accuracy, authorization, and compliance with school policy, and then prepares a check made to the vendor (or teacher, in case of reimbursement), attaching it to the supporting paperwork and giving all documentation to the Executive Director.
7. The Executive Director reviews all paperwork, including the check, comparing for accuracy and policy compliance throughout, and signs the check, returning all paperwork to the Office Manager for disbursement.
8. Office Manager mails the check to the vendor (or the teacher).
9. The check clears the bank, and the Business Manager notes such as she reconciles accounts, providing a copy of the reconciliation, bank statement, and complete finance reports for review by the finance and audit committee.

The school's Business Manager will be charged with carrying out the day-to-day management of the school's finances consistently with these principles, and will ensure that the school's assets (cash, buildings, and equipment) are adequately documented and protected, that school finance policy and state law are followed in all transactions, and that student enrollment records are accurate and reported to the state daily.

The Business Manager will be responsible to submit comprehensive Annual Financial Reports to the Board, the State Office of Education, and the State Auditor's office as required by law. In all aspects, the Business Manager will adhere to Generally Accepted Accounting Practices (GAAP), state law, and the school's finance policies. If necessary, the Board will provide external training and oversight to ensure that GAAP is fully in place upon the receipt of any public funds (including funds donated to our public school from private sources). Additionally, the Business Manager will be responsible to ensure that the school is properly insured, that grants and all restricted streams of funding are properly administered according to each source's guidelines, and that the school meets all other key financial obligations that are part of any state law or rule now in place or that may be in place in the future. The Business Manager will attend semi-annual finance training to stay abreast of changes in state law regarding school finance.

In all of these oversight and managerial tasks, the Business Manager will be supported by the administrative assistants, one of whom will have specific responsibility to manage student records and will carry the additional title of Registrar. (See Roles and Responsibilities subsection of Section Seven for day-to-day description of duties.) The designation of a single person to serve as registrar ensures that the school has the capacity to develop adequate policies and processes for tracking enrollment (including students with disabilities and English Language Learners) and attendance eligibility, as well as eligibility for financial waivers based on economic disadvantage. The registrar will submit data to the state and the Executive Director regularly to ensure that records are accurate.

Financial and student records will be stored in both paper and electronic formats. Paper records will be stored in fire-proof filing cabinets that lock to protect the records' integrity and security. Electronic records will be stored in the school's Student Information System (enrollment and student records) and in the Financial Information System (financial records). Both systems will be backed up to an off-site storage server regularly to ensure that they are maintained in emergencies or after any disaster or crime.

Facility

Leadership Academy of Utah has great flexibility when it comes to selecting a small facility for its administrative office. The entire state and its inventory of affordable commercial space is available. A cursory search of office space in Salt Lake County has returned over 100 viable options within the school's price range.

With a desire to begin office occupancy in about January of 2017, the Board (and the Executive Director, if hired at that point) will begin an office search in September of 2016, so that the school can find suitable office, remodeling it in minor ways if necessary, and set it up with communication and furnishings in time for January 2017 occupancy.

Plan and Timeline for Opening the School

The daunting task of school start-up will be completed by the school's hired staff, supporting expert services, and the ESP. The start-up work for a virtual school is a bit less overwhelming than a traditional school, if for no other reason that that the facility worry is largely not present. That said, the other aspects of start-up work are plenty by themselves. The administration will establish start-up responsibility categories, staffed by volunteer parents, the school's own limited faculty, the ESP and the engaged short-term experts. Those categories are:

- Procurement
- Enrollment
- Technology
- Business and Human Resources

In the first six months after the charter is approved, the Board will undertake the following activities in the timeline specified:

- Spring—Apply for start-up grants and loans
- Spring—Update school’s website with approval information and enrollment timelines and database, and post required information and disclosures
- Spring—Apply for tax exempt status with the Internal Revenue Service and establish state tax ID numbers
- Spring—Adopt and submit a start-up and planning year budget
- Spring—Open bank accounts
- Summer—Begin enrollment and marketing campaign and collect student and family information on website
- Summer—begin attending Directors’ meeting and submitting monthly financial reports
- Fall—Begin search for administrative office space
- Fall—Begin search for furniture and fixtures
- Fall—Establish payroll systems and benefit programs for employees who begin in January
- Fall—Draft policy manual based on legal requirements, state guidance and templates, and resources available through other resources and existing schools
- Winter—Select and occupy administrative office, furnished according to state purchasing policy
- Winter—Hire the Executive Director, who will subsequently hire the Office Manager and engage whatever individual experts are necessary and within budget for assistance
- Winter—Begin formal enrollment procedures according to policy

Once the director is in place, the school Board will transfer the new and increasing workload from January through the start of school year to the director’s purview, as the Board begins its transition to a policy governance model. The director (along with support team and the ESP), will then proceed along a timeline similar to that outlined below. This timeline begins with the end in mind, listing the top activity as the beginning of school, and then working backwards in time to ensure that all pre-steps are completed.

Planning Year Timeline

Timeframe	Business/HR	Procurement	Enrollment	Technology
Late August	SCHOOL BEGINS!			
Mid-August	<ul style="list-style-type: none"> • Complete hiring all staff • Train all staff in benefit programs and Human Resource policy & procedures (coordinate w/ benefit providers) 	<ul style="list-style-type: none"> • Provide teachers with basic classroom supplies for their home offices 	<ul style="list-style-type: none"> • Gather final paperwork from parents • Complete collection of student records from previous schools • Assign any new enrollees to classes 	<ul style="list-style-type: none"> • Final hookup and testing of school’s computer network • Assign email addresses to all staff • Check computers out to staff; train staff on policy and use of technology

Timeframe	Business/HR	Procurement	Enrollment	Technology
Early August	<ul style="list-style-type: none"> Finalize instructional staff and key office staff Place ads for schoolhouse staff and any remaining positions Instructional staff begins work as employees 	<ul style="list-style-type: none"> Call vendors for information on back-ordered items and develop contingency plans Work with teachers on classroom specific supply requests 	<ul style="list-style-type: none"> Continue collecting student records from previous schools 	
Late July			<ul style="list-style-type: none"> Continue collecting student records from previous schools 	
Mid-July		<ul style="list-style-type: none"> Prepare all computers for distribution 	<ul style="list-style-type: none"> Continue collecting student records from previous schools 	
Early July	<ul style="list-style-type: none"> Hire Business Manager, who will begin assuming schoolhouse business and finance responsibilities Hire additional Office Manager or School secretary 		<ul style="list-style-type: none"> Continue collecting student records from previous schools 	<ul style="list-style-type: none"> Ensure that all student-use computers filter through the school's server for content
Late June	<ul style="list-style-type: none"> Implement medical and other benefit programs to be in place in July when more employees begin work 		<ul style="list-style-type: none"> Send final acceptance letters; deadline for acceptance is June 30 	<ul style="list-style-type: none"> Deploy the school's internal network
Mid-June	<ul style="list-style-type: none"> Compile necessary items for employee packets to include handbook, benefit program information, and 	<ul style="list-style-type: none"> As equipment purchases arrive, check for accuracy and quality Number items as 	<ul style="list-style-type: none"> Collect enrollment paperwork from parents; enrollment deadline is June 15 Begin placing 	

Timeframe	Business/HR	Procurement	Enrollment	Technology
	legal paperwork	they arrive and develop a tracking sheet for inventory control, especially if items are stored at different locations	students in classes	
Early June	<ul style="list-style-type: none"> Complete employee handbook and send to board for approval 	<ul style="list-style-type: none"> Watch ads for screaming deals on school supplies and make purchases as appropriate 	<ul style="list-style-type: none"> Make final push for applications 	
May	<ul style="list-style-type: none"> Meet with benefit providers to customize benefit programs Begin employee handbook draft Submit budget for board approval 	<ul style="list-style-type: none"> Coordinate for temporary storage of school supplies and equipment Arrange for drop-shipping to student addresses 	<ul style="list-style-type: none"> Contact parents to receive enrollment information and forms. 	<ul style="list-style-type: none"> Contact UEN (Utah Education Network) about providing free high speed internet for the school and verify infrastructure requirements are met; plan for alternate service if necessary
April	<ul style="list-style-type: none"> Finalize teacher salaries based on legislation Develop salary agreements and sign with all current staff and new staff as hired Begin hiring additional administrative and instructional staff Draft Budget 	<ul style="list-style-type: none"> Place all technology orders Apply for credit as necessary Begin analysis of classroom supply needs 	<ul style="list-style-type: none"> Receive acceptance letters. Deadline for initial acceptance is April 30. 	<ul style="list-style-type: none"> Get board approval for any recommendations for equipment or services Create email accounts for any hired staff
March	<ul style="list-style-type: none"> Attend teacher hiring fairs and interview teaching 	<ul style="list-style-type: none"> Issue Request For Proposal for bulk technology 	<ul style="list-style-type: none"> Make follow up calls to enrolled parents; dog them 	<ul style="list-style-type: none"> Finalize network plans and budgets Find email service

Timeframe	Business/HR	Procurement	Enrollment	Technology
	staff <ul style="list-style-type: none"> • Send offer letters and follow up • Review legislative action related to school funding and regulations 	purchases <ul style="list-style-type: none"> • Compare bids to state contracts 	and make sure they return acceptance forms and other paperwork	and create board email addresses, if not already done
February	<ul style="list-style-type: none"> • Register for teacher fairs • Place ads for teachers on teachers-teachers.com and other places 	<ul style="list-style-type: none"> • Research options for technology and other equipment purchases • Complete furnishing administrative office 	<ul style="list-style-type: none"> • Big push for applications by third Friday in February • Hold initial lottery and send enrollment packets to lucky parents 	<ul style="list-style-type: none"> •
January	Establish Executive Committees—Hire Executive Director			

This timeline does not list all meetings that the director or support staff will attend. The timing, frequency, and location of these meetings is not known. However, the Executive Director or his designee will attend state- and teacher-provided trainings in:

- Student Information Systems and requirements
- Teacher licensure requirements and CACTUS
- Special Education
- Title I
- Charter Directors' meetings
- Utah Consolidated Application
- Assessment and accreditation
- Other required meetings

LAU believes that the entirety of this plan is reasonable, based on our research of the industry's best practices, and budget research, and that it will succeed and have full enrollment. The contingency planning is just that, for contingencies, and LAU anticipates success in either case, based on those plans and our ability to adapt to likely scenarios. In any case, the school will be well-prepared, with well-trained, competent leaders and staff, and will execute its well-designed business plan and deliver a quality, leadership-based education for Utah students.

Cash Flow Projection

Cash Flow Projection

Leadership Academy of Utah

Beginning Cash--2016-2017	\$ -	\$ -	\$ 147,271	\$ 144,542	\$ 141,813	\$ 139,083	\$ 194,354	\$ 181,083	\$ 167,813	\$ 229,542	\$ 161,938	\$ 94,333
Revenue	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Local												
State		\$ 150,000				\$ 75,000			\$ 75,000			
Federal												
Total	\$ -	\$ 150,000	\$ -	\$ -	\$ -	\$ 75,000	\$ -	\$ -	\$ 75,000	\$ -	\$ -	\$ -
Expenses												
Compensation							\$ 10,542	\$ 10,542	\$ 10,542	\$ 10,542	\$ 10,542	\$ 10,542
Services		\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729
Supplies & Equipment						\$ 17,000				\$ 54,333	\$ 54,333	\$ 54,333
Other												
Total		\$ 2,729	\$ 2,729	\$ 2,729	\$ 2,729	\$ 19,729	\$ 13,271	\$ 13,271	\$ 13,271	\$ 67,604	\$ 67,604	\$ 67,604
Net Income	\$ -	\$ 147,271	\$ (2,729)	\$ (2,729)	\$ (2,729)	\$ 55,271	\$ (13,271)	\$ (13,271)	\$ 61,729	\$ (67,604)	\$ (67,604)	\$ (67,604)
Ending Cash	\$ -	\$ 147,271	\$ 144,542	\$ 141,813	\$ 139,083	\$ 194,354	\$ 181,083	\$ 167,813	\$ 229,542	\$ 161,938	\$ 94,333	\$ 26,729

Budget

Budget submitted separately in an Excel format, per Application Final Checklist instructions.

Section Nine: Education Service Providers

LAU has already contracted with one Education Services Provider, Endeavor Education, LLC to assist the school's board in developing its charter application. That engagement is complete as of the submission of this final application. LAU intends to contract with a second Education Service Provider to provide education services. and anticipates that will be Williamsburg Educational Services, which is uniquely qualified to provide services according to this charter application and to fulfil the school's educational program and mission.

ESP Services in General

A virtual school like LAU needs a comprehensive online curriculum resource and learning management system. While it is possible to create this on one's own (like Mountain Heights Academy did), the LAU model has so many components (liberal arts, leadership, outdoor education, Socratic methodology, project-based learning), that it would be impractical to create all of those components with the funding and time available to startup schools in Utah.

Therefore, LAU sought to partner with an established service provider that would provide:

- A quality online curriculum with an emphasis on liberal arts and leadership
- Student educational support staff to enhance the reach of LAU's faculty
- Professional development in the key components of the charter
- An outdoor learning and leadership program
- A framework whereby all key employees (director and assistants, teachers and faculty) work for the school and not the ESP

In addition to ongoing curriculum and educational services, LAU also sought a Utah-based firm to assist in drafting this application. LAU's board of professionals has the qualifications and

expertise to draft such an application on its own, but lacked the time and specific experience in complying with the evolving charter school application and approval process in Utah. LAU's intention was to present the highest-quality application possible in the condensed timeframe between proposal approval and submission of the initial charter application.

Why these specific ESPs?

Endeavor Education

LAU chose Endeavor Education (EE) for assistance with the charter application because of that firm's combination of experience (EE's personnel have written all or part of more than a dozen charter school applications), success (all but one of those applications have ultimately been approved), and the short-term nature of the actual and implied agreement (there was no stated or implied expectation of continued services with Endeavor or any other ESP beyond the submission of the charter application, unlike with other firms who provide such services).

Williamsburg Educational Services

After an exhaustive search and review of available options, including sending a request for proposal to every known, multi-state provider of online education, LAU found that Williamsburg Educational Services was the only firm that could provide all six of the components listed above. In fact, Williamsburg Educational Services was the only provider to provide a response and proposal to LAU's formal request. In analyzing Williamsburg Educational Services' track record, LAU's Board found much success in academic achievement, as evidenced by educational results from both public and private schools across the country. Williamsburg Educational Services' track record is shown in data form in Section Four.

Compliance with the law

LAU followed Utah procurement law as outlined in 63G-6a and Board rule R277-113 in making the selection of both of these ESPs.

The relationship between both of the ESPs and LAU's Board is structured to maximize accountability for performance to the school and to the Board. In all aspects of the service that Williamsburg Educational Services provides, the Board retains all decision-making authority and final approval. If academic performance is not sufficient to meet the goals in this application and the authorizer's performance framework, the structure allows for termination of the Agreement so that LAU can find a better option. This structure furthers the mission of the school by putting the board's vision of the school at the forefront, and then evaluating Williamsburg Educational Services' results in light of the school's goals and mission.

Performance and Accountability

The Board will adopt accountability standards for academic performance consistent with its authorizer's Performance Standards and will hold Williamsburg Educational Services accountable for the school's performance related to those standards. Williamsburg Educational Services will not exist outside of the school's academic accountability policies. The same goals,

reports, and oversight will exist between the school's Board and ESP as exist between the Board and the Executive Director, including the same accountability for results.

Each month, Williamsburg Educational Services will report to the Board on the educational outcomes of students, which the Board will compare to its charter- and authorizer-established goals. The school will ensure that any agreement with this or any future ESP will contain a provision for termination upon failure to achieve stated outcomes, so that incentives for high performance will always be in place and that the school can hold Williamsburg Educational Services accountable with the ultimate threat of terminating services.

Appendix A: Waivers

LAU is not seeking any waivers.

Appendix B: Articles of Incorporation

ARTICLES OF INCORPORATION OF Leadership Academy of Utah

We, the undersigned natural persons all being of the age of eighteen years or more, acting as incorporators under the Utah Non-Profit Corporation and Cooperative Association Act, adopt the following Articles of Incorporation for Leadership Academy of Utah:

Article I Name: The name of the corporation is Leadership Academy of Utah.

Article II DURATION: The period of duration of Leadership Academy of Utah is perpetual.

Article III PURPOSE: (a) To provide educational services to Utah resident children as a public charter school; (b) To engage in any and all activities and pursuits, and to support or assist such other organizations, as may be reasonably related to the foregoing, which are substantially similar to the foregoing and which are or may hereafter be authorized by Section 501(c)(3) of the Internal Revenue Code and are consistent with those powers described in the Utah Nonprofit Corporation and Cooperation Association Act, as amended and supplemented; (c) To solicit and receive contributions, borrow money, purchase, own and sell real and personal property, to make contracts, and to engage in any activity "in furtherance of, incidental to, or connected with the furtherance of the corporation's goals, namely the creation and operation of a public charter school."

(i) This organization is organized exclusively for charitable purpose within the meaning of section 501(c)(3) of the Internal Revenue Code.

(ii) Notwithstanding any other provision of these Articles, the organization shall not carry on any other activities not permitted to be carried on by an organization exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code (or corresponding section of any future federal tax code).

(iii) Upon the dissolution and winding up of this organization, after paying or adequately providing for the debts and obligations of the organization, the remaining assets shall be distributed to a nonprofit fund, foundation, or corporation organized and operated exclusively for the purposes specified in section 501(c)(3) of the Internal Revenue Code and which has established its tax-exempt status under that section and consistent with Utah State Law.

(d) Neither the chartering entity nor the state, including an agency of the state, is liable for the debts or financial obligations of the organization or persons or entities that operate the charter school.

Article IV MEMBERS: The Corporation shall not have any members.

Article V BY-LAWS: Provisions for the regulation of the internal affairs of the corporation shall be set forth in the Bylaws.

Article VI TRUSTEES: The number of Trustees of Leadership Academy of Utah, their classifications, if any, their terms of office and the manner of their election or appointment shall be determined according to the Bylaws of Leadership Academy of Utah. Each Trustee shall hold office until such time as the Trustee resigns, is replaced by the remaining Trustees or by election, has reached such term limitations as may be imposed by the Bylaws or is removed by the Utah State Charter Schools Board ("USCSB") with or without cause. Vacancies on the Board of Trustees shall be filled by a vote of a majority of the remaining Trustees, even if less than a quorum, subject to approval of USCSB as set forth below.

Article VII INCORPORATORS: The names and addresses of the incorporators are:

Busch Jones 3230 S. Timeron Dr., West Valley City, Utah 84128

Article VIII REGISTERED OFFICE AND AGENT: The address of the corporation's initial registered office shall be: 3230 S. Timeron Dr., West Valley City, Utah 84128. Such office may be changed at any time by the Board of Trustees without amendment of these Articles of Incorporation. The corporation's initial registered agent at such address shall be: Busch Jones 3230 S. Timeron Dr., West Valley City, Utah 84128.

Article IX PRINCIPAL PLACE OF BUSINESS: The principal place of business of Leadership Academy of Utah shall be 3230 S. Timeron Dr., West Valley City, Utah 84128. Such principal place of business may be changed at any time by the Board of Trustees without amendment of these Articles of Incorporation.

ARTICLE X AMENDMENT: These Articles may be amended from time to time, in whole or in part, by the affirmative vote of two-thirds (2/3) of the Trustees; Any such amendments shall be consistent with the corporation's status as a tax exempt organization under Internal Revenue Code Section 501(c)(3).

In Witness Whereof, We, have executed these Articles of Incorporation in duplicate this twenty-fourth day of August, 2015, and say:

That they are all incorporators herein; that they have read the above and foregoing Articles of Incorporation; know the contents thereof and that the same is true to the best of their knowledge and belief, excepting as to matters herein alleged upon information and belief and as to those matters they believe to be true.

Appendix C: Governing Board Bylaws

ARTICLE I ORGANIZATION

1. The name of the organization shall be Leadership Academy of Utah.
2. The organization shall not have a seal but may design a logo.
3. The organization may at its pleasure by a vote of the Board of Trustees change its name with a 2/3rds vote, pending approval from the body that authorizes the school's charter (UCSB).

ARTICLE II PURPOSES

Leadership Academy of Utah, a Charter School, has been formed, and established to provide public education pursuant to Utah Code Annotated 53A-1a-500, the Utah Charter Schools Act.

ARTICLE III GOVERNANCE

Leadership Academy of Utah shall be governed by the Board of Trustees. All procedures, rights, and duties for the proper operation of the Board of Trustees are outlined by the Board of Trustees. The duties, rights, responsibilities and authority of the Board of Trustees are as found in the charter and as outlined in these Bylaws as amended from time to time. All governance of the school will be consistent with applicable state and federal law.

ARTICLE IV BOARD OF TRUSTEES

The Board of Trustees shall govern Leadership Academy of Utah. The total number of members shall be at least four and shall not exceed nine. The Board of Trustees shall be made up of the Trustees at the time of the adoption of these Bylaws and other members appointed consistent with these Bylaws. The initial trustees at the time of incorporation shall serve staggered terms, with a fairly equal number of members having terms that expire two, four, and six years from the date of incorporation.

After the date of incorporation, Trustees shall be appointed to the Board by a majority vote of the then-current Trustees. Trustees who take or are re-appointed after the date of incorporation shall hold office until such time as the member resigns or is removed consistent with these bylaws, or has completed a term of six years.

The Board of Trustees shall have the governance and oversight of the affairs and business of Leadership Academy of Utah. Such Board of Trustees shall only act in the name of the organization when it shall be regularly convened after due notice to the public of such meeting. The Board shall decide organizational matters only at properly noticed public meetings of the Board where a quorum of the Board is participating and only by a majority vote of the Trustees. The time, location, and agenda of Meetings of the Board shall be set by the Board Chair consistent with Utah's Public Meetings Act.

A majority of the members of the Board of Trustees shall constitute a quorum and the meetings of the Board of Trustees shall be held not less than quarterly on a schedule adopted by the Board of Trustees. The Board of Trustees may make such rules and regulations covering its meetings as it may in its discretion determine necessary.

A member may be removed when sufficient cause exists for such removal and by two-thirds (3/5) vote of the remaining members. The Board of Trustees may entertain charges against any member. At any hearing for removal, the accused member may be represented by counsel. The Board of Trustees shall adopt such rules for this hearing as it may in its discretion consider necessary for the best interests of Leadership Academy of Utah.

The Board of Trustees shall select from one of its members a Chair. The Chair shall preside at all meetings and prepare the agenda for each meeting. The Chair will be chosen by the majority vote of the Board of Trustees. She/he may be one of the officers who may sign the checks or drafts of the organization.

The Board of Trustees may select from one of its members a Vice Chair. The Vice Chair shall, in the event of the absence or inability of the Chair, become acting Chair of Leadership Academy of Utah with all the rights, privileges and powers associated with that office.

The Board of Trustees shall select from one of its members a secretary. The Secretary shall keep the minutes and records of the organization. It shall be his or her duty to file any certificate required by any statute, federal or state. She/he shall give and serve all notices to members of Leadership Academy of Utah. She/he shall be the official custodian of the records of Leadership Academy of Utah. She/he may be one of the officers required to sign the checks and drafts of the organization. She/he shall submit to the Board of Trustees any communications, which shall be addressed to him or her as Secretary of the organization. She/he shall exercise all duties incident to the office of Secretary.

The Board of Trustees shall select from one of its members a Treasurer. The Treasurer shall ensure the individuals or organizations that manage and have control and custody of the monies belonging to the organization follow organization policy in the care, management, and disbursement of said monies. She/he may be one of the officers with authority to sign checks or drafts of the organization. She/he shall exercise all duties incident to the office of Treasurer.

The Board of Trustees shall authorize the hiring and fix the compensation of the School Executive Director or Charter Management Organization. The Executive Director and/or Charter Management Organization shall authorize the hiring and set the compensation of all other employees.

ARTICLE V COMMITTEES

The Board of Trustees may appoint all committees of Leadership Academy of Utah. Committees have no authority except those specifically delegated to them in action by the Board.

ARTICLE VI INDEMNIFICATION

Leadership Academy of Utah shall indemnify any and all persons who may serve or who have served at any time as members or officers, and its respective heirs, administrators, successors, and assigns, against any and all expenses, including amounts paid upon judgments, Board of Trustees fees, and amounts paid in settlement (before or after suit is commenced), actually and necessarily incurred by such persons in connection with the defense or settlement of any claim, action, suit, or proceeding in which they, or any of them, are made parties, or a party, or which may be asserted against them or any of them, by reason of being or having been members or officers, except in relation to matters as to which any such member or officer or former member or officer shall be adjudged in any action, suit, or proceeding to be liable for his or her own negligence or misconduct in the performance of his or her duty. Expenses of each person indemnified hereunder incurred in defending a civil, criminal, administrative or investigative action, suit or proceeding (including all appeals), or threat thereof may be paid by Leadership Academy of Utah in advance of the final disposition of such action, suit or proceeding as authorized by the Board of Trustees, whether a disinterested quorum exists or not, upon receipt of an undertaking by or on behalf of the Board of Trustees to repay such amount unless it shall ultimately be determined that he or he/she is entitled to be indemnified by Leadership Academy of Utah. Such indemnification shall be in addition to any other rights to which those indemnified may be entitled under any law, bylaw, agreement, vote of members, or otherwise.

ARTICLE VII AMENDMENTS

These Bylaws may be altered, amended, repealed or added to by an affirmative vote of not less than two-thirds of the Board of Trustees, pending approval from the SCSB.

In all cases, these Bylaws shall be compliant with Utah and Federal statutes and rules governing Charter Schools. In cases of any current or future conflict, the statute or rule shall govern.

Appendix D: Minutes from Governing Board Meeting

Governing Board Minutes
Wednesday, September 23, 2015

Call to Order: Busch Jones, Board Chair

Adjournment: Set for 2:30

Board Members Present: Busch Jones (Chair), Suzanne Christensen, Ben Lindsey, Analisa Fisher, Dale Millsap. A Quorum is present

Visitors Present: Catherine Scott, Ilarene Patton, James Ure

Board Members Absent: Brian Langford, Valden Longhurst, Bryon Richardson

Agenda Items & Minutes:

1. Vote on official board positions
 - a. Busch Jones, voted Board Chair in June 2015, opens the floor for nominations for the Vice-Chair.
 - i. Dale Millsap nominates Suzanne Christensen, Analisa Fisher nominates Dale Millsap
 - ii. Votes for Dale Millsap: Busch Jones, Analisa Fisher
 - iii. Votes for Suzanne Christensen: Dale Millsap, Ben Lindsey, Suzanne Christensen
 - iv. Suzanne accepts, motion passes, Suzanne Christensen is elected Vice-Chair of governing board.
 - b. Busch Jones opens the floor for nominations for the Secretary.
 - i. Dale Millsap nominates Analisa Fisher, Suzanne Christensen seconds
 - ii. Vote unanimous in the affirmative, Analisa accepts, motion passes, Analisa Fisher is elected
 - c. Busch Jones opens the floor for nominations for the Treasurer.
 - i. Suzanne Christensen nominates Ben Lindsey, Dale Millsap seconds
 - ii. Vote unanimous in the affirmative, Ben accepts, motion passes, Ben Lindsey is elected Treasurer of governing board.
2. Vote on Bylaws and Articles of Incorporation
 - a. Suzanne Christensen motions that the Board accept Bylaws and Articles of Incorporation, and Dale Millsap seconds
 - b. Vote unanimous, motion passes
3. Vote to adopt the LAU Charter
 - a. Suzanne Christensen motions that the Board accept LAU charter as presently constituted, and Dale Millsap seconds.
 - b. Vote unanimous, motion passes.

Appendix E: ESP Contracts

Endeavor Education

ENDEAVOR EDUCATION, LLC

August 13, 2015

Leadership Academy of Utah

Dear Mr. Jones:

We are pleased that Leadership Academy of Utah (the "*Client*") has asked Endeavor Education, LLC, a Utah limited liability company ("*ENDEAVOR*"), to serve as your advisor. This letter will confirm our discussion with you regarding your engagement of ENDEAVOR and will describe the basis on which we will provide services to you. Although we do not wish to be overly formal in our relationship with you, we have found it a helpful practice to confirm with our clients the nature and terms of our services.

Accordingly, we submit for your approval this letter agreement (this "*Agreement*") governing our engagement. If you are in agreement, please sign the enclosed copy of this Agreement in the space provided below. Again, we are pleased to have the opportunity to serve you.

A. Services. ENDEAVOR will serve as the Client's Startup Advisor with respect to the Client's efforts to secure a Charter Agreement to operate a Charter School with the State Board of Education or another charter school authorizer in Utah. ENDEAVOR shall provide and devote such of its officers, directors, employees, agents, affiliates and consultants as shall be reasonably necessary for it to provide the Client any or all of the following services (the "*Services*") as reasonably required to satisfy the objectives of the Client to secure the Charter Agreement:

1. Assist in drafting, editing, and compiling an Application for a New Charter School;
2. Conduct research and analysis for the market analysis program of instruction for the school;
3. Work with designated school representatives to refine the mission, vision, and purpose of the school, as well as create a coherent and cohesive overview of the program of instruction;
4. Consult with and advise on creation and of performance measures;
5. Provide information and guidance on school governance structure as needed;

The Client may request that ENDEAVOR perform other Startup Services on behalf of the Client. Any such engagement shall be the subject of a separate agreement (or an addendum or supplement to this Agreement) between the parties.

B. Fees and Expenses. In connection with the provision of the Services, the Client shall pay to ENDEAVOR the following fees and expenses:

1. **Advisory Fee.** The advisory fee shall be \$70 per hour for work that ENDEAVOR's personnel spends in the Services section above. The Advisory Fee shall not be more than \$12,750. Total Advisory Fee shall be paid upon submission of the Application for a New Charter School to the State Charter School Board or on October 1, 2015, whichever occurs first, and upon presentation by ENDEAVOR of hours worked per section on that application.

C. **Reliance Upon and Accuracy of Information.** The Client understands, acknowledges, and agrees that ENDEAVOR may rely entirely upon publicly available information and information provided by the Client and the Client's officers, members, managers, directors, shareholders, employees, accountants, counsel, affiliates and other agents and advisors ("*Representatives*") without independent verification of the accuracy and completeness of such information. The Client represents and covenants that all information provided to ENDEAVOR by the Client or the Client's Representatives is or will be when furnished complete and correct in all material respects. If any information provided to ENDEAVOR becomes inaccurate, incomplete or misleading in any material respect during ENDEAVOR's engagement hereunder, the Client shall so advise ENDEAVOR. The Client will continuously advise ENDEAVOR with respect to any material developments or matters that occur or come to the Client's attention during the term of ENDEAVOR's engagement hereunder.

D. **Confidentiality.** In connection with ENDEAVOR's activities on behalf of the Client, the Client agrees to furnish ENDEAVOR with all information regarding the Client that ENDEAVOR reasonably believes necessary and appropriate to provide the Services hereunder. The Client will provide ENDEAVOR with access to the Client's Representatives. ENDEAVOR agrees to keep confidential all material nonpublic information provided to it by the Client, except as required by law or as contemplated by the terms of this Agreement. Notwithstanding anything to the contrary herein, ENDEAVOR may disclose material nonpublic information to its affiliates, agents and advisors and potential Third Party Sources whenever ENDEAVOR determines that such disclosure is necessary to provide the Services.

E. **Indemnity.** The Client agrees to indemnify and hold harmless ENDEAVOR and its Representatives from and against any and all claims, expenses, damages or liabilities, joint or several, to which ENDEAVOR or any Representative becomes subject under federal or state statutes, regulations, common law or otherwise, arising out of, in connection with, or based upon any matter contemplated by this Agreement, whether or not resulting in any liability. The Client agrees to reimburse ENDEAVOR and any Representative as and when incurred for any reasonable legal or other expenses incurred by ENDEAVOR or any Representative in connection with investigating or defending against any such claim, damage or liability or providing evidence, producing documents or taking any other action with respect thereto (whether or not ENDEAVOR or any Representative is a defendant in, or target of, such action, proceeding or investigation). In no event shall the Client be liable to ENDEAVOR or its Representatives under this paragraph, however, to the extent that any such claim, expense, damage or liability resulted from ENDEAVOR's or its Representatives' gross negligence or willful misconduct.

F. **Limitation of Engagement to the Client.** ENDEAVOR shall use reasonable efforts to assist the Client in obtaining approval to operate a charter school and entering a facilities development agreement with a development partner; provided, however, the Client acknowledges that ENDEAVOR's obligations hereunder are on a "best efforts" basis and shall

not constitute a guarantee that such results will occur. ENDEAVOR has been engaged hereunder as an independent contractor and not as an officer, board member, or with any authority to enter agreements or obligate funds or make policy or material decisions on behalf of the Client. The Client acknowledges that ENDEAVOR has been retained only by the Client, and that the Client's engagement of ENDEAVOR is not deemed to be on behalf of, and is not intended to confer rights upon, any Representative of the Client or any other person not a party hereto as against ENDEAVOR or any of its controlling persons, members, affiliates, directors, officers, employees or agents. Unless otherwise expressly agreed in writing by ENDEAVOR, no one other than the Client is authorized to rely upon this engagement or any other statements or conduct of ENDEAVOR, and no one other than the Client is intended to be a beneficiary of this Agreement. The Client acknowledges that any opinions, recommendations or advice, written or oral, given by ENDEAVOR to the Client in connection with ENDEAVOR's engagement are intended solely for the benefit and use of the Client's officers and directors related to school startup and facilities acquisition, and any such opinions, recommendations or advice are not on behalf of, and shall not confer any rights or remedies upon, any other person or be used or relied upon for any other purpose.

G. Limitation of ENDEAVOR's Liability to Client. ENDEAVOR and the Client further agree that neither ENDEAVOR nor any of its controlling persons, affiliates, directors, officers, employees or agents shall have any liability to the Client, its Representatives or creditors, or any person asserting claims on behalf of or in the right of the Client or its Representatives (whether direct or indirect, in contract, tort or otherwise) for any losses, fees, damages, liabilities, costs, expenses or equitable relief arising out of or relating to this Agreement or the provision of the Services, except to the extent that such losses, fees, damages, liabilities, costs, expenses or equitable relief resulted from the gross negligence or willful misconduct of ENDEAVOR of the express provisions of this Agreement.

H. Governing Law. The Client and ENDEAVOR acknowledge that this Agreement shall be interpreted, and the rights and liabilities determined, in accordance with the laws of the State of Utah without giving regard to the conflicts of law provisions thereof.

I. Arbitration of Disputes. Any claim or controversy arising out of or relating to this Agreement or the breach hereof may, at the election of the Client or ENDEAVOR, be submitted to non-binding arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association. The arbitration of any such claim or controversy shall take place at a location mutually agreeable to the Client and ENDEAVOR, or if the parties cannot agree upon such location, in Salt Lake City, Utah. Notwithstanding the foregoing, either party may elect to exercise all rights and remedies afforded to it by applicable law for any breach of this Agreement or for the settlement of any claim or controversy arising out of or relating to this Agreement in any court having jurisdiction.

J. Miscellaneous. This Agreement shall not be modified or amended except in writing signed by ENDEAVOR and the Client. This Agreement shall not be assigned by the Client without the prior written consent of ENDEAVOR; however, it is assignable by ENDEAVOR in its sole discretion without the consent of Client. This Agreement constitutes the entire agreement of ENDEAVOR and the Client with respect to the subject matter hereof and supersedes all prior agreements. If any provision of this Agreement is determined to be invalid

or unenforceable in any respect, such determination will not affect such provision in any other respect, and the remainder of the Agreement shall remain in full force and effect. This Agreement may be executed in counterparts, each of which shall be deemed an original but all of which together shall constitute one and the same instrument.

Nothing contained herein shall limit or preclude ENDEAVOR (a) from carrying on any business with, from providing Financial Advisory services to, or from participating in any capacity, including as a minority stockholder, in any person whatsoever, including without limitation, any competitor, supplier, lender or customer of the Client, or any other person which may have interests different than or adverse to the Client or (b) from carrying on its business as currently conducted or as such business may be conducted in the future. Client understands that ENDEAVOR has additional clients that are also seeking financings for similar purposes and from some of the same Third Party Sources as the Client and hereby expressly consents to such representations and any conflicts resulting therefrom.

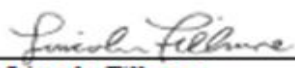
If you have any questions about these provisions, or if you would like to discuss possible modifications, do not hesitate to call.

[Signature Page Follows]

In acknowledgment that the foregoing correctly sets forth the understanding reached by ENDEAVOR and the Client, please sign in the space provided below, whereupon this letter shall constitute a binding agreement as of the date indicated above. The undersigned represents that he/she has the authority to enter into this Agreement to bind the Client.


Sincerely,

ENDEAVOR EDUCATION, LLC

By: 
Name: Lincoln Fillmore
Title: Managing Partner

Accepted and Agreed:

Leadership Academy of Utah, a pending Utah nonprofit corporation

By: 
Name: Busch Jones
Title: Board Chair
Date: 08/17/2015

Educational Services Agreement

Between Williamsburg Educational Services and

Leadership Academy of Utah

Parties

Williamsburg Educational Services, LLC (WES), an education management organization located at 32 E 100 S Suite 204, Saint George, Utah 84770, agrees with Leadership Academy of Utah (LAU), a Utah public charter school located at [LAU business address]. WES agrees to provide educational services and materials according to the terms herein. The Governing Board (Board) of LAU has authority to engage in contracts on behalf of LAU (under Utah law). The owners of WES, James C. Ure and N. Peter Jensen have full authority to engage in contracts on behalf of WES.

Intent

The Board has responsibility to oversee the performance of WES in the fulfillment of this agreement. LAU intends to provide a classical curriculum with an emphasis on leadership, the liberal arts, the use of technology, academic mentoring and teaching, professional development, and the establishment and perpetuation of a healthy and rigorous school culture by contracting with WES. WES intends to provide the services and materials specified herein, to the satisfaction of LAU.

Duration, Renewal & Termination

This agreement is valid and binding upon the authorized signature of a member of the LAU Board, and one of the owners of WES. The term of this agreement shall be two years, beginning the first year LAU begins operation.

Renewal

This agreement shall be renewed if both parties are satisfied with the performance of the other. After the expiration of the initial term, either party may choose not to renew this agreement, with or without cause.

Revision

WES and LAU anticipate that roles and responsibilities under this agreement will change over time, depending upon the needs of each party. Either party may therefore propose revisions to this agreement. Revisions must be in writing, must be signed by both parties, and must be included individually as addenda at the end of this document.

Termination with Cause

If either party is dissatisfied with the performance of the other, the dissatisfied party may notify the other party in writing by mail or email, stating the specific reasons for the dissatisfaction, and the provisions of this agreement, if any, that the dissatisfied party feels the other party is not meeting. The party receiving the notice of dissatisfaction shall respond in writing via mail or email, within thirty days, with explanation, and proposed corrective actions. If the party receiving the notice of

dissatisfaction does not reply within thirty days, the dissatisfied party shall send the original notice again, by certified mail. If the other party does not respond in writing and begin taking corrective action within fifteen days of the receipt of the certified mail notice, the party that sent the original notice of dissatisfaction may terminate this agreement due to the negligence of the other party. If WES ceases to provide services to LAU for five consecutive days during a fall or winter semester, LAU may immediately terminate this agreement. If LAU fails to pay WES according to the terms herein, WES may discontinue providing service to LAU thirty days after a fee payment is missed. If LAU fails to bring fees current within forty-five (45) days after a fee payment is missed, WES has sufficient cause to terminate this agreement.

Termination without Cause

This agreement may be terminated without cause by either party in the following circumstances: a party ceases to operate, or a party is financially or operationally unable to fulfill its roles and responsibilities. If LAU terminates this agreement without cause, LAU shall owe WES the full fee for all enrolled students for the year in which the termination without cause takes place. WES understands that LAU is solely responsible for its financial obligations, and that neither the State of Utah nor the individual Board members may be held liable for such obligations.

Termination Timing

If termination with or without cause becomes imminent, both parties pledge in good faith to make every possible effort to continue operating under this agreement until the end of the current school year as defined by the LAU school calendar.

Disposal of School Assets

In the event of termination of this agreement, both parties will retain ownership of physical goods and materials they have purchased. WES retains full ownership and usage rights to all of its curriculum, proprietary methods, and intellectual property shared with LAU. LAU agrees to return to WES all physical and intellectual property and not to use resources belonging to WES without explicit written permission.

Roles & Responsibilities

The Board is chiefly responsible for all aspects of LAU. All responsibilities not delegated to WES by the Board are retained by the Board.

The roles and responsibilities of LAU and WES are specified in this document and also in the LAU charter. It is the responsibility of both LAU and WES, in their respective roles, to adhere to all laws and regulations that apply to the operation of a public charter school in Utah.

WES Responsibilities

Charter

- Assist with the implementation, review, and if needed, amendment of the LAU charter.

Curriculum and Academic Support

- Provide LAU with a complete general education curriculum for grades 6–12 that meets Utah state graduation requirements.
- Ensure that WES courses meet Utah core standards.
- Provide access to all needed academic information for the accreditation process.
- In WES’s discretion, assist with creating and distributing student and parent handbooks.
- Provide academic support staff in the form of leadership coaches, teaching assistants, math and science tutors, and other paraprofessional academic support staff as needed.

Financial

- As requested by the board, and in WES’s discretion, counsel with the board about financial decisions, and advise the board about budgetary matters. WES does not have any financial responsibility or decision-making power.

Human Relations

- As requested, assist the Board with finding and selecting teachers, Board members, and administrative staff.
- As requested, assist with finding and hiring additional LAU teaching staff.
- As requested, help develop human resources policies, compensation plans, and strategic plans for staffing, development, and growth.

Marketing

- Assist with LAU identity and brand development.
- Help create and execute an online student recruitment strategy.
- Represent LAU at conferences and other recruitment events.
- Arrange for and attend meetings with individuals and groups interested in LAU.
- As requested, help develop community outreach strategy and connect with local organizations.
- Assist with public relations events via mail, e-mail, newspapers, magazines, journals, radio, television, community forums, town hall meetings, and other forms of communication and outreach.
- Provide suggestions about the design of school materials including a style guide, letterhead, business cards, forms, and other collateral materials.

Technology

- Provide a learning management system for all students.
- Provide a student information system for all students.
- Provide access to live online classroom software for all LAU staff and students.
- Provide suggestions for computers and other supplies LAU will provide to students. Also, help determine hardware configurations (including software and operating systems) for LAU technology needs.
- Create and maintain a website for LAU.
- Assist with creating/maintaining an electronic filing system.

- Support teachers and customer care associates in answering technology-related questions from students, parents, teachers, and administrators, and help LAU design tech support systems.
- Coordinate security, creative, and content issues pertaining to the LAU website.
- Handle troubleshooting issues for the LAU website and provide tech support to resolve errors.
- Provide advice to LAU about information security best practices.
- Provide technical support and instruction to LAU staff and students in the use of technology specific to WES's online learning platform and systems. Train LAU staff to respond to general tech support needs for LAU staff or students.

Materials

- Provide texts for courses in electronic format, and free of charge, when possible.
- Provide list of texts for each course to LAU staff and students.

Student Privacy and Protection

- Ensure that systems and services provided by WES are in compliance with FERPA.
- Provide continual transparent access to the LAU Director so that he/she will be fully aware of the privacy measures used by WES to protect student records.
- Maintain a current government-issued background check on all WES staff who have access to student records; share background checks with LAU administration.

Administration

- Provide reports to LAU at regular intervals to be established according to their respective due dates detailing student progress as documented in WES's Learning Management System.
- Provide guidance and support to LAU when LAU is interacting with the State of Utah relative to LAU's curriculum.
- As requested, review organizational documents of LAU that relate to WES's duties, and assist administration in maintaining uniformity and accuracy.
- As requested, review and make recommendations concerning contracts, agreements, policies and procedures.
- Generate academic reports as requested by the Board and/or administration.
- Assist in arranging and leading school orientation sessions.
- Report to the Board or administration all significant academic developments.
- Assist the Board in developing a strategic plan for school development, including year-end transitions.
- Provide timely information to LAU needed for reporting and audit requirements.
- Participate in the charter renewal process as needed.
- Give suggestions about how to create, design, and publish applications and enrollment systems and processes.
- Conduct focus groups, surveys, interviews, observation sessions, and/or user testing on the online school program to obtain feedback on how to improve the program.

- Set up and disseminate Learning Management System login and password accounts to students, teachers, and administrators and manage changes to those accounts.

Training & Professional Development

- Help maintain an online teacher training manual to all LAU teachers, and an administrator manual for all administrators.
- Design and deliver comprehensive teacher training on the WES curriculum, technological systems, policies and procedures, and any other operational systems/processes needed.
- Help design and deliver free parent trainings to help parents be involved in supporting their students.
- Help conduct orientation sessions for incoming parents and students.
- Work with the administration to address the continuing professional development needs of the staff.

Other Service Providers

LAU agrees that WES will be its sole curriculum provider for general education. LAU is free to contract with other providers for special education programs (including English Language Learners). WES will provide a complete curriculum (except for specialized curricula needed for special education programs) for grades 6–12, including all courses required to earn a high school diploma in Utah. LAU may contract with other service providers for services not provided by WES.

Special Education

WES is not responsible to provide any special education services to LAU students. LAU understands that the WES curriculum may not be accessible to students with disabilities. LAU is responsible for all special education students, including creating and implementing Individualized Education Plans (IEPs), and finding alternative curriculum providers for students who cannot use the WES curriculum due to a disability.

Financial Responsibility

The Board is primarily responsible for all financial matters at LAU, including management, compliance, bookkeeping, reporting and budgeting. WES may advise the Board on any of these matters if requested, but WES has no financial decision-making authority over general financial matters at LAU.

Compensation

LAU shall pay WES an educational services fee on a per-student per-year basis, as follows:

- **Educational Services Fee:** \$2,900 per student per academic year for curriculum, instruction, professional development, technology, marketing, and all other academic services as outlined in the Roles & Responsibilities section
- **Outdoor Leadership Seminar Fee:** \$440 per enrollment in the *Elevation* outdoor leadership course

WES will charge a prorated services fee for students who use the WES curriculum for only part of the school year. If LAU does not receive funding for some students using the WES curriculum due to those

students being disallowed during the enrollment audit, LAU will still be required to pay WES the full services fee for these students.

WES will not charge LAU the services fee for special education students who do not use the WES system. WES will not charge LAU any additional fees, unless LAU requests, and WES agrees, that WES will provide additional services. If this is the case, this contract will be revised to reflect the additional fees and duties. WES may not increase fees during an academic year. WES may increase fees from one year to the next without altering this agreement in writing, up to 5 percent per year. If WES plans to increase fees in an ensuing academic year, notice must be given to the Board at least ninety (90) days before the beginning of the year.

WES does not have authority, unless explicitly granted in writing for a specific purpose directed by the Board, to enter into contracts with third parties on behalf of LAU. The Board herein confirms to LAU that authority to conduct daily operations, including payment of fees to WES, and other financial management, may be delegated to the Director, and/or other administrators, and that WES may interpret financial actions taken by the Director and/or other administrators as if those actions were performed by the Board directly.

If LAU expenses exceed revenue due to lower than expected enrollment, or other factors, LAU must make a good faith effort to decrease its expenses and continue compensating WES per the fees in this agreement. If, after such good faith effort, LAU is able to provide documentary evidence to WES that LAU cannot meet its financial obligations to WES, the fees in this agreement may be re-negotiated without altering the rest of the agreement.

Timing of payments: LAU shall pay the educational services fee to WES in monthly installments, August through June, each due on the fifteenth day of the month. LAU shall pay the outdoor leadership seminar Fee at least two months before the seminar is scheduled to begin.

Property

While this agreement remains in force, WES shall allow LAU administrators and teaching staff to use WES's intellectual property in the form of curriculum, methods, Learning Management System configuration, and other forms of intellectual property, according to WES policy and guidelines. If this agreement is terminated or not renewed after the term expires, WES and LAU shall retain ownership of all intellectual property created by them respectively, and shall return to the other party all forms of intellectual property belonging to each party, and delete any remaining copies, unless arrangements are made for the continued use of intellectual property in a separate agreement. Each party owns the intellectual property it creates for use at LAU.

While this agreement remains in force, LAU shall allow WES access to its intellectual property in the form of budgets, reports, and other forms of intellectual property, subject to LAU policy and guidelines. Except as required by law, LAU shall not divulge to the public information regarding WES's internal operations and proprietary methods and intellectual property, without the written consent of WES.

Both parties shall have the right to disseminate information about the LAU program for marketing, advocacy, and general informational purposes. Both parties agree to disclose or keep private all information as required to comply with state and federal laws and regulations.

LAU will acquire and own all the physical assets needed to operate its headquarters office and will find and negotiate for office space.

All computers provided to LAU students shall be leased/purchased and managed by LAU. WES will have no ownership or management responsibility of computers. LAU shall provide all computers, servers, basic office software, and any other technology, technical support, and all other technical and office equipment. WES shall provide access to its Learning Management System, Student Information Services, and other online learning software for all LAU students.

Contingency

Except in the case of extraordinary or compelling circumstances, if this agreement is cancelled, the cancellation shall not take effect until the completion of the current academic year.

If this agreement is cancelled or not renewed, LAU shall have no special right to hire staff that worked with LAU but were not employees of LAU.

If this agreement is terminated or not renewed, WES will have sixty (60) days from the last date on which WES provides online courses to LAU students to provide all information to LAU necessary to ensure orderly transition to a new educational services provider, including: all student academic records and family/contact information, attendance, discipline, grades and other assessment results, and any other materials necessary to ensure an orderly transition to the new educational services provider.

Performance Oversight & Evaluation

The Board will evaluate the performance of WES in the following ways:

1. Verify that WES has completed its responsibilities listed in the “WES Responsibilities” section.
2. Weekly and monthly meetings with WES administrators and the LAU Director. The agenda for these meetings will include:
 - a. Reporting on grading, intervention, and response to student messages
 - b. Identifying and solving problems
 - c. Delegating projects and responsibilities to the right team members
 - d. Best practices for online teaching and implementing the WES curriculum
 - e. Any other help and support requested by the LAU Director
3. Conduct surveys to LAU students, parents, and all staff, annually, in which they will be asked to rate WES curriculum and services in detail. Surveys will contain scaled ratings (excellent, good, average, below average, poor) and open-ended essay responses. Both WES staff and the Board will have access to survey results. After each annual survey, the LAU Director and WES administrators will meet to determine the areas in which WES should focus its improvement efforts, and establish relevant deadlines.
4. LAU has established clear, measurable school-wide achievement goals. The Board will require WES to provide reports and continual open access to student achievement results, and will use these results to evaluate the performance of WES and determine whether to renew the

agreement with WES. The Board will review progress toward school-wide achievement goals at the conclusion of each fall and winter semester. If the Board chooses to engage a third party to evaluate the performance of WES, WES will cooperate with the third party and provide all academic information requested on behalf of the Board; the Board shall be responsible for fees charged by third-party evaluators. WES administrators will also be available for meetings with the Board upon request.

Signatures

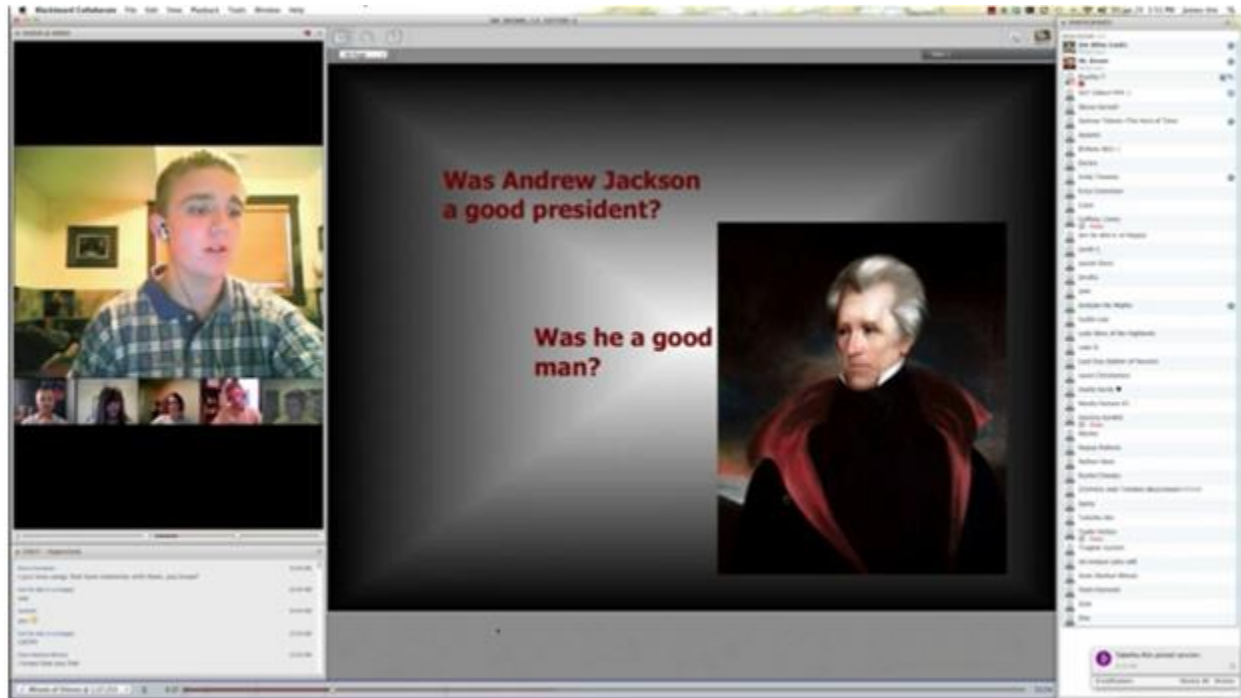
LAU

WES

_____	_____
Name and title	Name and title
_____	_____
Signature	Signature
_____	_____
Date	Date

Appendix F: Examples of Synchronous Online Instruction

The way in which Williamsburg's synchronous online instruction takes place is fairly unique. The following are descriptions of how learning takes place in this particular online environment.



This is a screen shot of a course taking place in Blackboard Collaborate™. Notice how teachers can easily share PowerPoint presentations with students while also being able to view the students in the class. Students participate via webcam and microphone. There is also a chat box (bottom left corner) where students can type questions and/or comments. Teachers also have an attendance list (on the right) to facilitate taking attendance and keeping track of participation.



Le /ɔ̃/

- Maison
- Sont
- Combien

These are screen shots of a French course taking place in Zoom. Most teachers use Zoom classrooms as backups in case of technical issues with Blackboard Collaborate or for office hours. Notice how teachers can easily see students' faces and can share their computer screen with students to go through PowerPoint presentations or other lesson material.

For more examples of how online instruction will look, refer to:
<http://www.williamsburgacademy.org/methods/what-classes-are-like/>

Appendix G: Policy for Discipline, Suspension, and Expulsion

LAU will comply with all laws and regulations relating to student discipline, currently found in Section 9 of Utah Code UCA53A-11. LAU recognizes many of the issues will relate to online interaction, and therefore cyber-bullying may be a bigger challenge at LAU than more traditional educational settings. It is hoped the leadership skill development will minimize this issue. When LAU students participate in school-sponsored activities in a designated location, the terms “property” and “building” referenced in the school discipline policy mean the location of the given activity, as it is unlikely activities will occur at the same location.

I. Purpose: The purpose of the policy is to foster a safe, positive environment for learning by teaching the practice of self-discipline, citizenship skills, and social skills, all taught in The Williamsburg Curriculum leadership courses. The school will provide supports to students and the community at large by expressly teaching students these skills.

A. Plans and policies shall be developed for classroom and student management which will include:

- I. Written standards for student behavior expectations, including school and classroom management;
- II. Effective instructional practices for teaching student expectations, including self-discipline, citizenship, civic skills, and social skills;
- III. Systematic methods for reinforcement of expected behaviors;
- IV. Uniform methods for correction of student behaviors; and
- V. Uniform methods for at least annual school-level data-base evaluations of efficiency and effectiveness.

B. On-going staff development shall be provided for all staff regarding:

- I. Effective instructional practices for teaching and reinforcing behavior expectations;
- II. Effective intervention strategies; and
- III. Effective strategies for evaluation of the efficiency and effectiveness of interventions.

C. LAU personnel shall determine the range of student behaviors and establish a continuum of administrative procedures that may be used by school personnel to address student behavior, including:

- I. Classroom level strategies; and
- II. Whole school level strategies

II. Range of Behaviors and Continuum of Procedures: LAU personnel shall determine by consensus student behavior infractions that should be dealt with at the classroom level and school level.

A. Minor infractions are defined as infraction of school rules that are usually handled by teachers in the classroom or at a school sponsored event or activity. Chronic or excessive minor infractions can become major infractions and result in office discipline referral to school administration. Minor infractions can result in a loss of privileges. The following are minor infractions:

- I. Dress code violations;
- II. Disrespect, including put downs, talking back, and defiance;
- III. Public displays of affection;
- IV. Inappropriate language and actions;
- V. Tardies;
- VI. Disruptive behavior including talk-outs and chronic talking;
- VII. Horseplay;
- VIII. Bus misconduct (if on a school-sponsored activity); and
- IX. Noncompliance;

B. Major infractions are defined as severe infractions of school rules that result in immediate office discipline referrals to school administration and usually lead to out of school suspension.

Major infractions include:

- I. Safe school violations, including assault, threats to kill/harm, discrimination;
- II. Drug, alcohol, and tobacco violations;
- III. Physical aggression including fighting and throwing objects at a person;
- IV. Any criminal action occurring at school such as vandalism, fire setting, possession or use of combustibles, forgery, and theft;
- V. Chronic or excessive abusive language, truancy, tardies, or non-compliance; and
- VI. Bullying and harassment, including cyber bullying and harassment.

C. LAU administration, in consult with applicable teacher(s) shall be authorized to issue notices of disruptive behavior. These personnel shall provide documentation of habitually disruptive student behavior prior to court referral.

III. Training: LAU will provide training and strategies for students and staff in the following:

- I. Overt aggression;
- II. Relational aggression;
- III. Cyber bullying;
- IV. Intervention skills;
- V. Social skills;
- VI. Adult supervision of students; and
- VII. Provide for student assessment of the prevalence of bullying in school.

IV. Prohibited Conduct and Related Discipline: Prohibited conduct is forbidden at school, on school property, including school vehicles, and at any school activity. A serious violation that threatens or harms a school, school property, a person connected with school, or property associated with a person connected with school is forbidden regardless of where it occurs.

A. A student WILL be removed from school for at least 1 year for a serious violation involving the following:

- I. A real weapon; or
- II. Explosive or flammable material; or
- III. Actual or threatened use of a look-alike weapon with intent to intimidate or cause disruption.

IV. Exceptions may be made on a case by case basis through the Board of Trustees.

B. A student WILL be removed from school for the following:

- I. Possession, control, actual or threatened use of a real weapon, explosive, noxious, or flammable material;
- II. Actual or threatened use of a look-alike weapon with intent to intimidate or cause disruption;
- III. The sale, control or distribution of a drug, controlled substance, imitation controlled substance, or drug paraphernalia;
- IV. Using or threatening to use serious force;
- V. The commission of an act involving the use of force or the threatened use of force which if committed by an adult would be a felony or class A misdemeanor; or
- VI. A serious violation of Section II.C affecting a student or staff member.

C. A student MAY be removed from school for the following:

- I. Willful disobedience or violating a school or district rule;
- II. Defying authority;
- III. Disruptive behavior;
- IV. Foul, profane, vulgar, or abusive language;
- V. Defacing or destroying school property;
- VI. Truancy;
- VII. Theft;
- VIII. Posing a significant threat to the welfare, safety or morals of a student, school personnel, or the operation of the school;
- IX. Fighting;
- X. Bullying (including, but not limited to, behavior intended to cause harm or distress in a relationship with an imbalance of power, especially if repeated over time, including cyber bullying);
- XI. Possessing, using, controlling, or being under the influence of alcohol, a drug, an imitation drug, drug paraphernalia, or misusing any substance;
- XII. Possessing or using tobacco;
- XIII. Hazing, demeaning, or assaulting someone, or forcing someone to ingest a substance;
- XIV. Inappropriate exposure of body parts;
- XV. Sexual or other harassment; or
- XVI. Gang-related attire or activity.

The decision to remove or to discipline in some other way is made by the Executive Director based on all the circumstances.

D. The type and length of discipline is based on factors such as previous violations, severity of conduct, and other relevant educational concerns.

E. When appropriate, students will be placed on remedial discipline plans.

F. School personnel may use reasonable physical restraint, if necessary, to protect a person or property from physical injury or to remove a violent or disruptive student.

G. If damage or loss of school property occurs, official report cards, diploma, and transcripts may be withheld until payment for the damage is received or the lost property is recovered.

V. Habitual Disruptive Behavior:

Definitions:

Qualifying minor means a school-age minor who is at least 9 years old or turns 9 years old at any time during the school year.

Disruptive behavior means behavior outlined in Sections IV. .A, B, and C above.

Notice of Disruptive Student Behavior

- I. A Notice of Disruptive Student Behavior may only be issued to a qualifying minor.
- II. A Notice of Disruptive Student Behavior may only be issued by a school administrator or a designee.
- III. A Notice of Disruptive Student Behavior shall be issued when the student has:
 - a. Engaged in disruptive behavior (that does not result in suspension or expulsion) 3 times during the school year; or
 - b. Engaged in disruptive behavior that results in suspension or expulsion once during the school year.

A Notice of Disruptive Behavior requires that the student and parent meet with school authorities to discuss the disruptive behavior. The student and/or parent may contest a Notice of Disruptive Student Behavior in the following manner:

- I. If the notice is written by an assistant administrator or other designee, the appeal is made to the Executive Director;
- II. If the notice is written by the principal, the appeal is made to the Board of Trustees.

A school representative shall provide to the student's parent a list of resources available to assist the parent in resolving the student's behavior.

The school shall establish procedures for the school counselor or other designated school representative to work with a student in order to attempt to resolve the student's behavior problem before the student becomes subject to the jurisdiction of the Juvenile Court.

C. Habitual Disruptive Student Behavior Citation

The Habitual Disruptive Student Behavior Citation may only be issued to a student who has received a Notice of Disruptive Student Behavior and:

- I. Engages in disruptive behavior (that does not result in suspension or expulsion) at least 6 times during the school year;
- II. Engages in disruptive behavior that does not result in suspension or expulsion at least 3 times during the school year and engages in disruptive behavior that results in suspension or expulsion, at least once during the school year; or
- III. Engages in disruptive behavior that results in suspension or expulsion, at least twice during the school year.

A Habitual Disruptive Student Behavior Citation may only be issued by the Executive Director.

The citation shall be mailed by certified mail to, or served on, the parent of the student.

A student to whom a Habitual Disruptive Student Behavior Citation is issued shall be referred to the Juvenile Court. Within five days after the citation is issued, a representative of LAU shall provide documentation to the parent and the court of the efforts made by a school counselor or representative. The Executive Director will cooperate with the Juvenile Court in providing other information as needed, including but not limited to attendance, grades, and behavioral reports.

VI. Searches: School personnel may search students, lockers, personal property, and vehicles parked on school property based on reasonable suspicion. School personnel may also conduct random searches that might include all lockers and other school property.

VII. Suspension and Expulsion Defined: Suspension is disciplinary removal from school with an offer of educational services. Expulsion is a disciplinary removal from school by the Board of Trustees for more than 10 school days without an offer of alternative educational service.

VIII. Readmission and Admission: If a student is removed from school under II.A, readmission depends upon satisfactory evidence that the student will not be a danger to self, others, or school property. If a student is removed from school under II.B or C, the student may be readmitted after the parent/guardian meets with school officials to make a plan to correct the behavior(s) and after the student completes both the days of suspension and any conditions imposed. LAU may deny admission to a student who has been expelled from any school in the last twelve months.

IX. Due Process: If a student is removed from school or otherwise disciplined under this policy, the student has the right to meet with the site administrator to tell his/her side of the story. If the Executive Director recommends removal for more than 10 school days, a committee composed of the Board of Trustees will hear the case at the school with the student, the parent or guardian, the Executive Director, and others as necessary. This hearing will be held within 10 school days of removal from school. If a student is removed from school for more than 10 school days, an appeal of the decision may be made in writing to the Board of Trustees within 10 school days of the decision. The parent or guardian is responsible to plan and to pay for any educational services not provided by the district during the suspension.

X. Students with Disabilities: If a student has a qualified disability, the Executive Director will explain the separate procedures that may apply based on the procedural safeguards under the Individuals with Disabilities Education Act (IDEA) or Section 504 of the Rehabilitation Act.

Leadership Academy of Utah		Fiscal Year: FY17 (7/1/16 - 6/30/17)		
Revenue		Planning Year		
Charter School Revolving Loan		\$200,000		
Total Revenue from State Sources (3000)		\$300,000		
State Startup Grant		\$100,000		
Private Grants (specify)				
Loans:				
Commercial		\$0		
Other (specify)		\$0		
Total Revenue from Other Sources (5000)		\$0		
Total Revenue		\$300,000		
Expenditures		Number	Salary/Cost	Total
--- SALARIES ---				
24.121	Salaries - Principals and Assistants	0.50	\$80,000	\$40,000
24.152	Salaries - Secretarial and Clerical	0.50	\$35,000	\$17,500
24.100	Salaries - Other School Administration	0.00	\$0	\$0
	Total - School Administration Salaries (100)			\$57,500
26.182	Salaries - Operation & Maintenance of Facilities	0.00	\$0	\$0
	Total 2600 - Operation & Maintenance of Facilities Salaries (100)			\$0
TOTAL - ALL SALARIES (100)		\$57,500		
--- BENEFITS ---				
24.210	Retirement - School Administration	0%	\$57,500	\$0
26.210	Retirement - Operation & Maintenance of Facilities	0%	\$0	\$0
	Total - All Retirement			\$0
24.220	Social Security/FICA/Unemployment/Workers Comp - School Administration	10%	\$57,500	\$5,750
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & Maintenance of Facilities	10%	\$0	\$0
	Total - All Social Security/FICA/Unemployment/Workers Compensation			\$5,750
24.240	Insurance (Health/Dental/Life) - School Administration	0%	\$57,500	\$0
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facilities	0%	\$0	\$0
	Total - All Insurance (Health/Dental/Life)			\$0
24.290	Other Benefits (specify) - School Administration	0%	\$57,500	\$0
26.290	Other Benefits (specify) - Operation & Maintenance of Facilities	0%	\$0	\$0
	Total - All other benefits (specify)			\$0
TOTAL ALL BENEFITS (200)		\$5,750		
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---				
24.300	Purchased Professional & Technical Services - School Administration			\$12,000
26.300	Purchased Professional & Technical Services - Operation & Maintenance of Facilities			\$0
45.300	Purchased Professional & Technical Services - Building Acquisition & Construction Services			\$0
TOTAL - ALL PURCHASED PROFESSIONAL & TECHNICAL SERVICES (300)		\$12,000		
--- PURCHASED PROPERTY SERVICES ---				
26.400	Purchased Property Services			\$0
26.441	Rental of Land & Buildings			\$11,250
26.450	Construction and Remodeling			\$0
TOTAL - ALL PURCHASED PROPERTY SERVICES (400)		\$11,250		
--- OTHER PURCHASED SERVICES ---				
24.520	Insurance(other than employee benefits - e.g. D&O)			\$0
45.521	Property Insurance			\$0
45.522	Liability Insurance			\$2,500
24.530	Communication(telephone and other)			\$0
26.530	Communication(telephone and other)			\$6,000
24.540	Advertising			\$0
24.550	Printing and Binding			\$0
24.580	Travel/Per Diem			\$1,000
26.580	Travel/Per Diem			\$0
TOTAL - OTHER PURCHASED SERVICES (500)		\$9,500		
--- SUPPLIES ---				
10.600	Instructional Supplies			
10.641	Textbooks	0.00	\$0	\$0
21.600	Supplies - Student Support Services	0.00	\$0	\$0
22.600	Supplies - Instructional Staff Support Services	0.00	\$0	\$0
22.644	Library Books	0.00	\$0	\$0
22.650	Periodicals	0.00	\$0	\$0
22.660	Audio Visual Materials - Instructional Support Staff	0.00	\$0	\$0
24.600	Supplies - School Administration			\$0
31.600	Supplies - Food Service			\$0

31.630	Food - Food Service		\$0
TOTAL - ALL SUPPLIES (600)			\$0
--- PROPERTY ---			
10.700	Property (Instructional Equipment) - Instruction		
21.700	Property - Student Support Services		\$0
22.700	Property - Instructional Staff Support		\$0
24.700	Property - School Administration		\$5,000
26.700	Property - Operation & Maintenance of Facilities		\$0
31.700	Property - Food Services		\$0
31.780	Depreciation - Kitchen Equipment Depreciation - Food Services		\$0
49.710	Land and Improvements		\$0
49.720	Buildings		\$0
27.732	School Buses		\$0
10.733	Furniture and Fixtures - Instruction		\$0
24.733	Furniture and Fixtures - School Administration		\$2,000
22.733	Furniture and Fixtures - Instructional Support Staff		\$0
21.733	Furniture and Fixtures - Student Support Services		\$0
10.734	Technology Equipment - Instruction		\$163,000
24.734	Technology Equipment - School Administration		\$10,000
22.734	Technology Equipment - Instructional Support Staff		\$0
21.734	Technology Equipment - Student Support Services		\$0
27.735	Non-Bus Vehicles		\$0
10.739	Other Equipment - Instruction		\$0
24.739	Other Equipment - School Administration		\$0
22.739	Other Equipment - Instructional Support Staff		\$0
21.739	Other Equipment - Instruction		\$0
TOTAL - ALL PROPERTY (700)			\$180,000
--- OTHER OBJECTS ---			
10.800	Other Objects- Instruction		\$0
21.800	Other Objects- Student Support		\$0
22.800	Other Objects- Instructional Staff		\$0
24.800	Other Objects- School Administration		\$0
26.800	Other Objects - Operation & Maintenance of Facilities		\$0
31.800	Other Objects - Food Services		\$0
10.800	Other Objects - Building Acquisition		\$0
	Total - All Other Objects		\$0
10.810	Dues and Fees - Instruction		\$0
21.810	Dues and Fees - Student Support		\$0
22.810	Dues and Fees - Instructional Staff		\$0
24.810	Dues and Fees -School Administration		\$0
26.810	Dues and Fees - Operation & Maintenance of Facilities		\$0
	Total - All Dues and Fees		\$0
TOTAL - OTHER OBJECTS (800)			\$0
3000	Total State		\$300,000
TOTAL REVENUES			\$300,000
100	Salaries		\$57,500
200	Employee Benefits		\$5,750
300	Purchased Professional and Technical Services		\$12,000
400	Purchased Property Services		\$11,250
500	Other Purchased Services		\$9,500
600	Supplies		\$0
700	Property		\$180,000
800	Other Objects		\$0
TOTAL EXPENDITURES			\$176,000
Excess or Deficiency of Revenues over Expenditures			\$24,000
Other Sources of Funding (5000)			\$0
Net Asset Balance (Fund Balance)			\$24,000
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)			8%
Percentage of Funding Contributed to Reserve Balance (Total Rev - Total Exp / Total Rev = >5%)			0.08
Necessary Closure Fund (2 months Purchased Prop Serv + Other)			\$1,875

CHARTER SCHOOL WORKSHEET

*****PROJECTION ONLY*****

Leadership Academy of Utah

	Enrollment	Rating Factor	WPU Generated
Estimated enrollment (K)		0.55	0
Estimated enrollment (1-3)		0.9	0
Estimated enrollment (4-6)	40	0.9	36
Estimated enrollment (7-8)	40	0.99	39.6
Estimated enrollment (9-12)	49	1.2	58.8
Special Ed enrollment (K)			
Special Ed enrollment (1-12)	12.9		
Special Ed (Self-Contained)	1.29		
Number of Teachers (K-6)			
Number of Teachers (7-12)	3.15		
WPU Value	\$3,092	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	3.15		
School Administrators (CACTUS)			

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	134.4000	\$ 415,565
Professional Staff	0.059507	7.9977	24,729
Restricted Basic School:			
Special Ed--Add-on	1.0000	14.1900	38,682
Spec. Ed. Self-Contained	1.0000	1.2900	3,989
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$261.97 per K-8 ADM		20,958
Total WPU Programs		157.8777	\$ 503,922
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$28.30 per WPU		\$ 4,468
Special Populations			
Enhancement for At-Risk Students	\$26.38 per student		3,403
Enhancement for Accelerated Students	\$5.00 per student		645
Other			
School Land Trust Program	\$49.35 per student		6,366
Reading Achievement Program	\$15.81 per student-Guarantee Program		-
Charter Administrative Costs	\$100 per student		12,900
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		16,427
ESA-School Administrators	\$3,104 per qualified administrator		-
Library Books and Resources	\$0.960162 per student	130.29	125
Local Replacement Dollars	Average \$1,660 per student		216,281
Total Non-WPU			\$ 260,616
One Time			
Teacher Materials/Supplies ^{1, 2}	\$176.33 per eligible F.T.E.	3.15	555
Total One Time			\$ 555
ESTIMATED Total All State Funding			
			\$ 815,093
¹ Steps one through three get \$250; steps four or higher get \$175 ² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Danny Schoenfeld @ 801-538-7958			Updated 04-10-14

CHARTER SCHOOL WORKSHEET

*****PROJECTION ONLY*****

Leadership Academy of Utah

	Enrollment	Rating Factor	WPU Generated
Estimated enrollment (K)		0.55	0
Estimated enrollment (1-3)		0.9	0
Estimated enrollment (4-6)		0.9	54
Estimated enrollment (7-8)	60	0.99	99
Estimated enrollment (9-12)	120	1.2	144
Special Ed enrollment (K)	0		
Special Ed enrollment (1-12)	28		
Special Ed (Self-Contained)	2.8		
Number of Teachers (K-6)			
Number of Teachers (7-12)	5.666666667		
WPU Value	\$3,092	<i>(Except for CTE Add-on and Special Ed.)</i>	
No. of Teachers (FTE) (CACTUS)	5.666666667		
School Administrators (CACTUS)			

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	297.0000	\$ 918,324
Professional Staff	0.059507	17.6736	54,647
Restricted Basic School:			
Special Ed--Add-on	1.0000	30.8000	83,961
Spec. Ed. Self-Contained	1.0000	2.8000	8,658
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$261.97 per K-8 ADM		41,915
Total WPU Programs		348.2736	\$ 1,107,504
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$28.30 per WPU		\$ 9,856
Special Populations			
Enhancement for At-Risk Students	\$26.38 per student		7,386
Enhancement for Accelerated Students	\$5.00 per student		1,400
Other			
School Land Trust Program	\$49.35 per student		13,818
Reading Achievement Program	\$15.81 per student-Guarantee Program		-
Charter Administrative Costs	\$100 per student		28,000
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		29,552
ESA-School Administrators	\$3,104 per qualified administrator		-
Library Books and Resources	\$0.960162 per student	282.8	272
Local Replacement Dollars	Average \$1,660 per student		469,448
Total Non-WPU			\$ 559,732
One Time			
Teacher Materials/Supplies ^{1, 2}	\$176.33 per eligible F.T.E.	5.666666667	999
			-
Total One Time			\$ 999
ESTIMATED Total All State Funding			
			\$ 1,768,235
¹ Steps one through three get \$250; steps four or higher get \$175 ² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Danny Schoenfeld @ 801-538-7958			Updated 04-10-14

Leadership Academy of Utah		FY18			FY18		
First Operational Year		100% Enrollment			Breakeven Enrollment		
Number of Students:		280			129		
Grade Configuration:		6-12			6-12		
Revenue							
Child Nutrition Program (CNP) and Lunchroom Sales		280			129		
Student Activities		\$14,000			\$6,450		
Other		\$0			\$0		
Total Revenue From Local Sources (1000)		\$14,000			\$6,450		
Charter School Revolving Loan		X			X		
State Educational Funding		\$1,768,235			\$815,093		
Total Revenue from State Sources (3000)		\$1,768,235			\$815,093		
Lunch and Breakfast Reimbursement							
Restricted Federal Through State		\$0			\$0		
Programs for the Disabled (IDEA)		\$40,768			\$18,782		
Elementary and Secondary Education Act (ESEA)		\$38,035			\$17,523		
Total Revenue from Federal Sources (4000)		\$78,803			\$36,306		
Private Grants & Donations:		\$0			\$0		
Source(s) (specify)		\$0			\$0		
Loans:					\$0		
Commercial		\$0			\$0		
Other (specify)		\$0			\$0		
Prior Year Carryforward		\$24,000			\$24,000		
Total Revenue from Other Sources (5000)		\$24,000			\$24,000		
Total Revenue		\$1,885,038			\$866,756		
Expenditures		Number	Salary/Cost	Total	Number	Salary/Cost	Total
--- SALARIES ---							
10.131	Salaries - Teachers	5.67	\$26,541	\$150,400	3.15	\$26,541	\$83,605
10.132	Salaries - Substitute Teachers	0.00	\$0	\$0	0.00	\$0	\$0
10.161	Salaries - Teacher Aides and Paraprofessionals	0.00	\$0	\$0	0.00	\$0	\$0
10.100	Salaries - Other 1000-Instruction	0.00	\$0	\$0	0.00	\$0	\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$150,400			\$83,605
21.141	Salaries - Attendance and Social Work Personnel	0.00	\$0	\$0	0.00	\$0	\$0
21.142	Salaries - Guidance Personnel	0.75	\$50,000	\$37,500	0.50	\$50,000	\$25,000
21.143	Salaries - Health Services Personnel	0.00	\$0	\$0	0.00	\$0	\$0
21.144	Salaries - Psychological Personnel	0.00	\$0	\$0	0.00	\$0	\$0
21.152	Salaries - Secretarial and Clerical	0.00	\$0	\$0	0.00	\$0	\$0
21.100	Salaries - Other 2100-Student Support	0.00	\$0	\$0	0.00	\$0	\$0
	Total - STUDENT SUPPORT Salaries (100)			\$37,500			\$25,000
22.145	Salaries - Media Personnel - Certified	0.00	\$0	\$0	0.00	\$0	\$0
22.162	Salaries - Media Personnel - Noncertified	0.00	\$0	\$0	0.00	\$0	\$0
22.100	Salaries - Other 2200-Instructional Staff Support	0.00	\$0	\$0	0.00	\$0	\$0
	Total - INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$0			\$0
24.121	Salaries - Principals and Assistants	1.25	\$80,000	\$100,000	1.00	\$80,000	\$80,000
24.152	Salaries - Secretarial and Clerical	2.00	\$35,000	\$70,000	1.00	\$40,000	\$40,000
24.100	Salaries - Other 2400-School Administration	1.00	\$65,000	\$65,000	0.75	\$60,000	\$45,000
	Total -SCHOOL ADMINISTRATION Salaries (100)			\$235,000			\$165,000
26.100	Salaries - Operation & Maintenance of Facilities	0.00	\$0	\$0	0.00	\$0	\$0
	Total -OPERATION & MAINT OF FACILITIES Salaries (100)			\$0			\$0
31.100	Salaries - Food Services	0.00	\$0	\$0	0.00	\$0	\$0
	Total -FOOD SERVICES Salaries (100)			\$0			\$0
	TOTAL - ALL SALARIES (100)			\$422,900			\$273,605
--- BENEFITS ---							
10.210	Retirement - Instruction	1%	\$150,400	\$1,504	1%	\$83,605	\$836
21.210	Retirement - Student Support	4%	\$37,500	\$1,500	0%	\$25,000	\$0
22.210	Retirement - Instructional Staff Support	4%	\$0	\$0	0%	\$0	\$0
24.210	Retirement - School Administration	4%	\$235,000	\$9,400	3%	\$165,000	\$4,950
26.210	Retirement - Operation & Main of Facilities	0%	\$0	\$0	0%	\$0	\$0
31.210	Retirement - Food Services	0%	\$0	\$0	0%	\$0	\$0
	Total - All Retirement			\$12,404			\$5,786
10.220	Social Security/FICA/Unemployment/Workers Comp - Instruction	10%	\$150,400	\$15,040	10%	\$83,605	\$8,360
21.220	Social Security/FICA/Unemployment/Workers Comp - Student Support	10%	\$37,500	\$3,750	10%	\$25,000	\$2,500
24.220	Social Security/FICA/Unemployment/Workers Comp -School Administration	10%	\$235,000	\$23,500	10%	\$165,000	\$16,500
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & Maintenance	10%	\$0	\$0	10%	\$0	\$0
31.220	Social Security/FICA/Unemployment/Workers Comp - Food Services	10%	\$0	\$0	10%	\$0	\$0
	Total - Social Security/FICA/Unemployment/Workers Comp			\$42,290			\$27,360
10.240	Insurance (Health/Dental/Life) - Instruction	2%	\$150,400	\$3,008	2%	\$83,605	\$1,672
21.240	Insurance (Health/Dental/Life) - Student Support	10%	\$37,500	\$3,750	10%	\$25,000	\$2,500
24.240	Insurance (Health/Dental/Life) - School Administration	10%	\$235,000	\$23,500	10%	\$165,000	\$16,500
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facilities	0%	\$0	\$0	0%	\$0	\$0
31.240	Insurance (Health/Dental/Life) - Food Services	0%	\$0	\$0	0%	\$0	\$0
	Total- All Insurance(Health/Dental/Life)			\$30,258			\$20,672
10.200	Other Benefits (specify) - Instruction	0%	\$150,400	\$0	0%	\$83,605	\$0
21.200	Other Benefits (specify) - Student Support	0%	\$37,500	\$0	0%	\$25,000	\$0

24.200	Other Benefits (<i>specify</i>) - School Administration	0%	\$235,000	\$0	0%	\$165,000	\$0
26.200	Other Benefits (<i>specify</i>) - Operation & Maintenance of Facilities	0%	\$0	\$0	0%	\$0	\$0
31.200	Other Benefits (<i>specify</i>) - Food Services	0%	\$0	\$0	0%	\$0	\$0
	Total - All Other Insurance			\$0			\$0
-----TOTAL ALL BENEFITS (200)-----							
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---							
10.300	Purchased Prof & Tech Services - Instruction			\$487,200			\$224,460
21.300	Purchased Prof & Tech Services - Student Services			\$35,000			\$17,500
22.300	Purchased Prof & Tech Services - Instructional Staff Support			\$182,000			\$83,850
24.300	Purchased Prof & Tech Services - School Administration			\$87,000			\$31,700
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilities			\$0			\$0
31.300	Purchased Prof & Tech Services - Food Services			\$0			\$0
-----TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)-----							
--- PURCHASED PROPERTY SERVICES ---							
26.400	Purchased Property Services			\$5,000			\$2,000
26.441	Rental of Land & Buildings			\$22,500			\$22,500
26.450	Construction and Remodeling			\$0			\$0
-----TOTAL - ALL PURCHASED PROPERTY SERVICES (400)-----							
--- OTHER PURCHASED SERVICES ---							
27.510	Student Transportation services			\$2,800			\$1,290
24.520	Insurance(other than employee benefits - e.g. D&O)			\$0			\$0
45.521	Property Insurance			\$1,000			\$1,000
45.522	Liability Insurance			\$3,360			\$3,360
10.530	Communication(telephone and other)			\$0			\$0
21.530	Communication(telephone and other)			\$0			\$0
24.530	Communication(telephone and other)			\$13,500			\$13,500
26.530	Communication(telephone and other)			\$0			\$0
21.540	Student Activities			\$20,000			\$10,000
10.550	Printing and Binding			\$0			\$0
21.550	Printing and Binding			\$0			\$0
24.550	Printing and Binding			\$0			\$0
10.560	Tuition			\$0			\$0
21.570	Food Service Management			\$0			\$0
21.580	Travel/Per Diem			\$0			\$0
24.580	Travel/Per Diem			\$2,500			\$1,000
26.580	Travel/Per Diem			\$0			\$0
10.590	Inter-educational, Interagency Purchased Services						\$0
-----TOTAL - OTHER PURCHASED SERVICES (500)-----							
--- SUPPLIES ---							
10.600	Instructional Supplies	0	\$0	\$2,800	0	\$0	\$1,290
10.641	Textbooks	280	\$650	\$196,000	129	\$650	\$86,430
21.600	Supplies - Student Support Services	0	\$0	\$0	0	\$0	\$0
22.644	Library Books	0	\$0	\$1,000	0	\$0	\$500
22.650	Periodicals	0	\$0	\$0	0	\$0	\$0
24.600	Supplies - School Administration	280	\$25	\$7,000	129	\$20	\$2,580
26.600	Supplies - Operation & Maintenance of Facilities			\$1,000	3	\$200	\$600
31.600	Supplies - Food Service	0	\$0	\$0	0	\$0	\$0
31.630	Food - Food Service			\$0			\$0
-----TOTAL - ALL SUPPLIES (600)-----							
--- PROPERTY ---							
10.700	Property (Instructional Equipment) - Instruction			\$0			\$0
21.700	Property - Student Support Services			\$0			\$0
24.700	Property - School Administration			\$5,000			\$5,000
26.700	Property - Operation & Maintenance of Facilities			\$0			\$0
31.700	Property - Food Services			\$0			\$0
31.780	Depreciation - Kitchen Equipment Depreciation			\$0			\$0
49.710	Land and Improvements			\$0			\$0
49.720	Buildings			\$0			\$0
27.732	School Buses			\$0			\$0
10.733	Furniture and Fixtures - Instruction			\$0			\$0
24.733	Furniture and Fixtures - School Administration			\$3,000			\$0
21.733	Furniture and Fixtures - Student Support Services			\$0			\$0
10.734	Technology Equipment - Instruction			\$65,533			\$0
24.734	Technology Equipment - School Administration			\$11,200			\$0
21.734	Technology Equipment - Student Support Services			\$0			\$0
27.735	Non-Bus Vehicles			\$0			\$0
10.739	Other Equipment - Instruction			\$0			\$0
21.739	Other Equipment - Student Support Services			\$0			\$0
24.739	Other Equipment - School Administration			\$0			\$0
-----TOTAL - ALL PROPERTY (700)-----							
--- OTHER OBJECTS ---							
10.800	Other Objects- Instruction			\$0			\$0
21.800	Other Objects- Student Support			\$0			\$0
24.800	Other Objects- School Administration			\$2,800			\$1,290

26.800	Other Objects - Operation & Maintenance of Facilities		\$0		\$0
31.800	Other Objects - Food Services		\$0		\$0
45.800	Other Objects - Building Acquisition		\$0		\$0
	Total - All Other Objects		\$0		\$0
10.810	Dues and Fees - Instruction		\$0		\$0
21.810	Dues and Fees - Student Support		\$0		\$0
24.810	Dues and Fees -School Administration		\$0		\$0
26.810	Dues and Fees - Operation & Maintenance of Facilities		\$0		\$0
	Total - All Dues and Fees		\$0		\$0
TOTAL - OTHER OBJECTS (800)			\$2,800		\$1,290
Total Building Acquisition & Instruction (4500)					
45.830	Interest		\$3,151		\$3,151
45.840	Redemption of Principal		\$49,324		\$49,324
Total other financing sources (usps) and other items			\$52,475		\$52,475
1000	Total Local		\$14,000		\$6,450
3000	Total State		\$1,768,235		\$815,093
4000	Total Federal		\$78,803		\$36,306
TOTAL REVENUES			\$1,861,038		\$857,849
100	Salaries		\$422,900		\$273,605
200	Employee Benefits		\$84,952		\$53,819
300	Purchased Professional and Technical Services		\$791,200		\$357,510
400	Purchased Property Services		\$27,500		\$24,500
500	Other Purchased Services		\$43,160		\$0
600	Supplies		\$207,800		\$91,400
700	Property		\$84,733		\$5,000
800	Other Objects		\$52,475		\$1,290
TOTAL EXPENDITURES			\$1,714,720		\$807,123
Excess or Deficiency of Revenues over Expenditures			\$146,319		\$50,726
Other Sources of Funding (5000)			\$24,000		\$24,000
Net Asset Balance (Fund Balance)			\$170,319		\$74,726
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)			9%		9%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)			8%		6%
Necessary Closure Fund (2 months Purch Prop Serv + Other)			\$13,329		\$4,298

CHARTER SCHOOL WORKSHEET

*****PROJECTION ONLY*****

Leadership Academy of Utah

	Enrollment	Rating Factor	WPU Generated
Estimated enrollment (K)		0.55	0
Estimated enrollment (1-3)		0.9	0
Estimated enrollment (4-6)		0.9	76.5
Estimated enrollment (7-8)	85	0.99	138.6
Estimated enrollment (9-12)	160	1.2	192
Special Ed enrollment (K)	0		
Special Ed enrollment (1-12)	38.5		
Special Ed (Self-Contained)	3.85		
Number of Teachers (K-6)			
Number of Teachers (7-12)			
WPU Value	\$3,058	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	8.79		
School Administrators (CACTUS)			
Prior Year WPUs	297		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	407.1000	\$ 1,244,746
Professional Staff	0.059507	24.2253	74,071
Restricted Basic School:			
Special Ed--Add-on	1.0000	42.3500	115,446
Spec. Ed. Self-Contained	1.0000	3.8500	11,772
Special Ed Pre-School	1.0000	3.8500	11,772
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$261.97 per K-8 ADM		58,943
Total WPU Programs		481.3753	\$ 1,516,750
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$28.30 per WPU		\$ 13,623
Special Populations			
Enhancement for At-Risk Students	\$26.38 per student		10,156
Enhancement for Accelerated Students	\$5.00 per student		1,925
Other			
School Land Trust Program	\$49.35 per student		19,000
Reading Achievement Program	\$15.81 per student-Guarantee Program		-
	\$1.33 per K-3 student		395
	\$29.94 per low income student		-
Charter Administrative Costs	\$100 per student		38,500
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		45,849
ESA-School Administrators	\$3,104 per qualified administrator		-
Library Books and Resources	\$0.960162 per student	388.85	373
Local Replacement Dollars	Average \$1,665 per student		645,491
Total Non-WPU			\$ 775,312
One Time			
Teacher Materials/Supplies ^{1,2}	\$176.33 per eligible F.T.E.	8.791666667	1,550
			-
Total One Time			\$ 1,550
ESTIMATED Total All State Funding			\$ 2,293,612
¹ Steps one through three get \$250; steps four or higher get \$175 ² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Danny Schoenfeld @ 801-538-7958			Updated 04-10-14

Leadership Academy of Utah		FY19		
Second Year of Operation		100% Enrollment		
Number of Students:		385		
Grade Configuration:				
Revenue				
Child Nutrition Program (CNP) and Lunchroom Sales				
Student Activities		\$7,700		
Other		\$0		
Total Revenue From Local Sources (1000)		\$7,700		
Charter School Revolving Loan		X		
State Educational Funding		\$2,293,612		
Total Revenue from State Sources (3000)		\$2,293,612		
Lunch and Breakfast Reimbursement		0	\$0	
Restricted Federal Through State		\$0		
Programs for the Disabled (IDEA)		\$56,056		
Elementary and Secondary Education Act (ESEA)		\$52,298		
Total Revenue from Federal Sources (4000)		\$108,354		
Private Grants & Donations:		\$0		
Source(s) (specify)		\$0		
Loans:		\$0		
Commercial		\$0		
Other (specify)		\$0		
Prior Year Carryforward		\$170,319		
Total Revenue from Other Sources (5000)		\$170,319		
Total Revenue		\$2,579,985		
Expenditures		Number	Salary/Cost	Total
--- SALARIES ---				
10.131	Salaries - Teachers	8.79	\$27,337	\$240,341
10.132	Salaries - Substitute Teachers	0.00	\$0	\$0
10.161	Salaries - Teacher Aides and Paraprofessionals	0.00	\$0	\$0
10.100	Salaries - Other 1000-Instruction	0.00	\$0	\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$240,341
21.141	Salaries - Attendance and Social Work Personnel	0.00	\$0	\$0
21.142	Salaries - Guidance Personnel	1.10	\$51,500	\$56,650
21.143	Salaries - Health Services Personnel	0.00	\$0	\$0
21.144	Salaries - Psychological Personnel	0.00	\$0	\$0
21.152	Salaries - Secretarial and Clerical	0.00	\$0	\$0
21.100	Salaries - Other 2100-Student Support	0.00	\$0	\$0
	Total - STUDENT SUPPORT Salaries (100)			\$56,650
22.145	Salaries - Media Personnel - Certified	0.00	\$0	\$0
22.162	Salaries - Media Personnel - Noncertified	0.00	\$0	\$0
22.100	Salaries - Other 2200-Instructional Staff Support	0.00	\$0	\$0
	Total - INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$0
24.121	Salaries - Principals and Assistants	2.00	\$82,400	\$164,800
24.152	Salaries - Secretarial and Clerical	2.50	\$36,050	\$90,125
24.100	Salaries - Other 2400-School Administration	1.00	\$66,950	\$66,950
	Total -SCHOOL ADMINISTRATION Salaries (100)			\$321,875
26.100	Salaries - Operation & Maintenance of Facilities	0.00	\$0	\$0
	Total -OPERATION & MAINT OF FACILITIES Salaries (100)			\$0
31.100	Salaries - Food Services	0.00	\$0	\$0
	Total -FOOD SERVICES Salaries (100)			\$0
	TOTAL -ALL SALARIES (1000)			\$618,866
--- BENEFITS ---				

10.210	Retirement - Instruction	1%	\$240,341	\$2,403
21.210	Retirement - Student Support	4%	\$56,650	\$2,266
22.210	Retirement - Instructional Staff Support	4%	\$0	\$0
24.210	Retirement - School Administration	4%	\$321,875	\$12,875
26.210	Retirement - Operation & Main of Facilities	0%	\$0	\$0
31.210	Retirement - Food Services	0%	\$0	\$0
	Total - All Retirement			\$17,544
10.220	Social Security/FICA/Unemployment/Workers Comp - Instruction	10%	\$240,341	\$24,034
21.220	Social Security/FICA/Unemployment/Workers Comp - Student Support	10%	\$56,650	\$5,665
24.220	Social Security/FICA/Unemployment/Workers Comp -School Administration	10%	\$321,875	\$32,188
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & Maintenance	10%	\$0	\$0
31.220	Social Security/FICA/Unemployment/Workers Comp - Food Services	10%	\$0	\$0
	Total - Social Security/FICA/Unemployment/Workers Comp			\$61,887
10.240	Insurance (Health/Dental/Life) - Instruction	2%	\$240,341	\$4,807
21.240	Insurance (Health/Dental/Life) - Student Support	10%	\$56,650	\$5,665
24.240	Insurance (Health/Dental/Life) - School Administration	10%	\$321,875	\$32,188
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facilities	0%	\$0	\$0
31.240	Insurance (Health/Dental/Life) - Food Services	0%	\$0	\$0
	Total- All Insurance(Health/Dental/Life)			\$42,659
10.200	Other Benefits (<i>specify</i>) - Instruction	0%	\$240,341	\$0
21.200	Other Benefits (<i>specify</i>) - Student Support	0%	\$56,650	\$0
24.200	Other Benefits (<i>specify</i>) - School Administration	0%	\$321,875	\$0
26.200	Other Benefits (<i>specify</i>) - Operation & Maintenance of Facilities	0%	\$0	\$0
31.200	Other Benefits (<i>specify</i>) - Food Services	0%	\$0	\$0
	Total - All Other Insurance			\$0
TOTAL ALL BENEFITS (200)				\$122,090
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---				
10.300	Purchased Prof & Tech Services - Instruction			\$669,900
21.300	Purchased Prof & Tech Services - Student Support			\$10,000
22.300	Purchased Prof & Tech Services - Instructional Staff Support			\$250,250
24.300	Purchased Prof & Tech Services - School Administration			\$10,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilities			\$0
31.300	Purchased Prof & Tech Services - Food Services			\$0
TOTAL ALL PURCHASED PROF & TECH SERVICES (300)				\$940,150
--- PURCHASED PROPERTY SERVICES ---				
26.400	Purchased Property Services			\$5,150
26.441	Rental of Land & Buildings			\$23,175
26.450	Construction and Remodeling			\$0
TOTAL ALL PURCHASED PROPERTY SERVICES (400)				\$28,325
--- OTHER PURCHASED SERVICES ---				
27.510	Student Transportation services			\$2,884
24.520	Insurance(other than employee benefits - e.g. D&O)			\$0
45.521	Property Insurance			\$1,030
45.522	Liability Insurance			\$4,759
10.530	Communication(telephone and other)			\$0
21.530	Communication(telephone and other)			\$0
24.530	Communication(telephone and other)			\$13,905
26.530	Communication(telephone and other)			\$0
24.540	Advertising			\$27,500
10.550	Printing and Binding			\$0
21.550	Printing and Binding			\$0
24.550	Printing and Binding			\$0
10.560	Tuition			\$0
21.570	Food Service Management			\$0

21.580	Travel/Per Diem		\$0
24.580	Travel/Per Diem		\$2,575
26.580	Travel/Per Diem		\$0
10.590	Inter-educational, Interagency Purchased Services		\$0
TOTAL - OTHER PURCHASED SERVICES (500)			\$52,653
--- SUPPLIES ---			
10.600	Instructional Supplies		\$2,884
10.641	Textbooks		\$269,500
21.600	Supplies - Student Support Services		\$0
22.644	Library Books		\$1,375
22.650	Periodicals		\$0
24.600	Supplies - School Administration		\$7,210
26.600	Supplies - Operation & Maintenance of Facilities		\$1,030
31.600	Supplies - Food Service		\$0
31.630	Food - Food Service		\$0
TOTAL - ALL SUPPLIES (600)			\$281,999
--- PROPERTY ---			
10.700	Property (Instructional Equipment) - Instruction		\$0
21.700	Property - Student Support Services		\$0
24.700	Property - School Administration		\$0
26.700	Property - Operation & Maintenance of Facilities		\$0
31.700	Property - Food Services		\$0
31.780	Depreciation - Kitchen Equipment Depreciation		\$0
49.710	Land and Improvements		\$0
49.720	Buildings		\$0
27.732	School Buses		\$0
10.733	Furniture and Fixtures - Instruction		\$0
24.733	Furniture and Fixtures - School Administration		\$0
21.733	Furniture and Fixtures - Student Support Services		\$0
10.734	Technology Equipment - Instruction		\$95,427
24.734	Technology Equipment - School Administration		\$1,000
21.734	Technology Equipment - Student Support Services		\$0
27.735	Non-Bus Vehicles		\$0
10.739	Other Equipment - Instruction		\$0
21.739	Other Equipment - Student Support Services		\$0
24.739	Other Equipment - School Administration		\$0
TOTAL - ALL PROPERTY (700)			\$96,427
--- OTHER OBJECTS ---			
10.800	Other Objects- Instruction		\$0
21.800	Other Objects- Student Support		\$0
24.800	Other Objects- School Administration		\$3,850
26.800	Other Objects - Operation & Maintenance of Facilities		\$0
31.800	Other Objects - Food Services		\$0
45.800	Other Objects - Building Acquisition		\$0
	Total - All Other Objects		\$0
10.810	Dues and Fees - Instruction		\$0
21.810	Dues and Fees - Student Support		\$0
24.810	Dues and Fees -School Administration		\$0
26.810	Dues and Fees - Operation & Maintenance of Facilities		\$0
	Total - All Dues and Fees		\$0
TOTAL - OTHER OBJECTS (800)			\$3,850
Total Building Acquisition & Instruction (4500)			
45.830	Interest		\$2,207

45.840	Redemption of Principal		\$50,267
Total other financing sources (uses) and other items			\$52,475

1000	Total Local		\$7,700
3000	Total State		\$2,293,612
4000	Total Federal		\$108,354
TOTAL REVENUES			\$2,409,667
100	Salaries		\$618,866
200	Employee Benefits		\$122,090
300	Purchased Professional and Technical Services		\$940,150
400	Purchased Property Services		\$28,325
500	Other Purchased Services		\$52,653
600	Supplies		\$281,999
700	Property		\$96,427
800	Other Objects		\$52,475
TOTAL EXPENDITURES			\$2,192,985
Excess or Deficiency of Revenues over Expenditures			\$216,682
Other Sources of Funding (5000)			\$170,319
Net Asset Balance (Fund Balance)			\$387,001
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)			16%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)			9%
Necessary Closure Fund (2 months Purch Prop Serv + Other)			\$13,467

CHARTER SCHOOL WORKSHEET

*****PROJECTION ONLY*****

Leadership Academy of Utah

	Enrollment	Rating Factor	WPU Generated
Estimated enrollment (K)		0.55	0
Estimated enrollment (1-3)		0.9	0
Estimated enrollment (4-6)	100	0.9	90
Estimated enrollment (7-8)	200	0.99	198
Estimated enrollment (9-12)	190	1.2	228
Special Ed Pre-School			
Special Ed enrollment (K)	0		
Special Ed enrollment (1-12)	49		
Special Ed (Self-Contained)	4.9		
Number of Teachers (K-6)			
Number of Teachers (7-12)	8.166666667		
WPU Value	\$3,146	(Except for CTE Add-on and Special Ed.)	
No. of Teachers (FTE) (CACTUS)	8.166666667		
School Administrators (CACTUS)	0		
Prior Year WPUs	407.1		
Low Income Students-prior year	0		

Program Name	Rate	WPU Generated	Amount Generated
WPU Programs			
Regular Basic School:			
Regular WPU - K-12	See above	516.0000	\$ 1,623,372
Professional Staff	0.059507	30.7056	96,602
Restricted Basic School:			
Special Ed--Add-on	1.0000	53.9000	146,931
Spec. Ed. Self-Contained	1.0000	4.9000	15,416
Special Ed Pre-School	1.0000	0.0000	-
Special Ed-State Programs	Based on Programs		
Career and Technical Ed.	Based on Programs		
Class Size Reduction (K-8)	\$261.97 per K-8 ADM		78,591
Total WPU Programs		605.5056	\$ 1,960,912
Non-WPU Programs			
Related to Basic Programs:			
Flexible Allocation-WPU Distribution	\$28.30 per WPU		\$ 17,136
Special Populations			
Enhancement for At-Risk Students	\$26.38 per student		12,926
Enhancement for Accelerated Students	\$5.00 per student		2,450
Other			
School Land Trust Program	\$49.35 per student		24,182
Reading Achievement Program	\$15.81 per student-Guarantee Program		-
	\$1.33 per K-3 student		541
	\$29.94 per low income student		-
Charter Administrative Costs	\$100 per student		49,000
Educator Salary Adjustment (ESA)	\$5,215 per qualified educator plus benefits		42,589
ESA-School Administrators	\$3,104 per qualified administrator		-
Library Books and Resources	\$0.960162 per student	494.9	475
Local Replacement Dollars	Average \$1,670 per student		821,534
Total Non-WPU			\$ 970,833
One Time			
Teacher Materials/Supplies ^{1, 2}	\$176.33 per eligible F.T.E.	8.166666667	1,440
			-
Total One Time			\$ 1,440
ESTIMATED Total All State Funding			
			\$ 2,933,186
¹ Steps one through three get \$250; steps four or higher get \$175			
² Steps one through three get \$200; steps four or higher get \$150			
Questions: Call Danny Schoenfeld @ 801-538-7958			Updated 04-10-14

Leadership Academy of Utah		2019-2020		
Second Operational Year		100% Enrollment		
Number of Students:		490		
Revenue				
Child Nutrition Program (CNP) and Lunchroom Sales				
Student Activities		\$10,010		
Other		\$0		
Total Revenue From Local Sources (1000)		\$10,010		
State Educational Funding		\$2,933,186		
Total Revenue from State Sources (3000)		\$2,933,186		
Lunch and Breakfast Reimbursement				
Restricted Federal Through State		\$0		
Programs for the Disabled (IDEA)		\$71,344		
Elementary and Secondary Education Act (ESEA)		\$66,562		
Total Revenue from Federal Sources (4000)		\$137,906		
Private Grants & Donations:				
Source(s) <i>(specify)</i>		\$0		
Loans:		\$0		
Commercial		\$0		
Other <i>(specify)</i>		\$0		
Prior Year Carryforward		\$387,001		
Total Revenue from Other Sources (5000)		\$387,001		
Total Revenue		\$3,468,102		
Expenditures		Number	Salary/Cost	Total
--- SALARIES ---				
10.131	Salaries - Teachers	8.17	\$28,125	\$229,685
10.132	Salaries - Substitute Teachers	0.00	\$0	\$0
10.161	Salaries - Teacher Aides and Paraprofessionals	0.00	\$0	\$0
10.100	Salaries - Other 1000-Instruction	0.00	\$0	\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)			\$229,685
21.141	Salaries - Attendance and Social Work Personnel	0.00	\$0	\$0
21.142	Salaries - Guidance Personnel	2.00	\$52,983	\$105,966
21.143	Salaries - Health Services Personnel	0.00	\$0	\$0
21.144	Salaries - Psychological Personnel	0.00	\$0	\$0
21.152	Salaries - Secretarial and Clerical	0.00	\$0	\$0
21.100	Salaries - Other 2100-Student Support	0.00	\$0	\$0
	Total - STUDENT SUPPORT Salaries (100)			\$105,966
22.145	Salaries - Media Personnel - Certified	0.00	\$0	\$0
22.162	Salaries - Media Personnel - Noncertified	0.00	\$0	\$0
22.100	Salaries - Other 2200-Instructional Staff Support	0.00	\$0	\$0
	Total - INSTRUCTIONAL STAFF SUPPORT Salaries (100)			\$0
24.121	Salaries - Principals and Assistants	2.50	\$84,773	\$211,933
24.152	Salaries - Secretarial and Clerical	3.00	\$37,088	\$111,265
24.100	Salaries - Other 2400-School Administration	1.50	\$68,878	\$103,317
	Total -SCHOOL ADMINISTRATION Salaries (100)			\$426,515
26.100	Salaries - Operation & Maintenance of Facilities	0.00	\$0	\$0
	Total -OPERATION & MAINT OF FACILITIES Salaries (100)			\$0
31.100	Salaries - Food Services	0.00	\$0	\$0
	Total -FOOD SERVICES Salaries (100)			\$0
	TOTAL - ALL SALARIES (100)			\$762,166
--- BENEFITS ---				
10.210	Retirement - Instruction	0%	\$0	\$0
21.210	Retirement - Student Support	1%	\$0	\$1,060
22.210	Retirement - Instructional Staff Support	4%	\$211,933	\$0

24.210	Retirement - School Administration	4%	\$0	\$17,061
26.210	Retirement - Operation & Main of Facilities	4%	\$0	\$0
31.210	Retirement - Food Services	0%	\$0	\$0
	Total - All Retirement			\$18,120
10.220	Social Security/FICA/Unemployment/Workers Comp - Instruction	10%	\$0	\$22,969
21.220	Social Security/FICA/Unemployment/Workers Comp - Student Support	10%	\$0	\$10,597
24.220	Social Security/FICA/Unemployment/Workers Comp -School Administration	10%	\$0	\$42,651
26.220	Social Security/FICA/Unemployment/Workers Comp - Operation & Maintenance of Facilities	10%	\$0	\$0
31.220	Social Security/FICA/Unemployment/Workers Comp - Food Services	10%	\$0	\$0
	Total - Social Security/FICA/Unemployment/Workers Comp			\$76,217
10.240	Insurance (Health/Dental/Life) - Instruction	0%	\$0	\$0
21.240	Insurance (Health/Dental/Life) - Student Support	2%	\$0	\$2,119
24.240	Insurance (Health/Dental/Life) - School Administration	10%	\$0	\$42,651
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facilities	10%	\$0	\$0
31.240	Insurance (Health/Dental/Life) - Food Services	0%	\$0	\$0
	Total- All Insurance(Health/Dental/Life)			\$44,771
10.200	Other Benefits (<i>specify</i>) - Instruction	0%	\$0	\$0
21.200	Other Benefits (<i>specify</i>) - Student Support	0%	\$0	\$0
24.200	Other Benefits (<i>specify</i>) - School Administration	0%	\$0	\$0
26.200	Other Benefits (<i>specify</i>) - Operation & Maintenance of Facilities	0%	\$0	\$0
31.200	Other Benefits (<i>specify</i>) - Food Services	0%	\$0	\$0
	Total - All Other Insurance			\$0
	TOTAL ALL BENEFITS (200)			\$139,108
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---				
10.300	Purchased Prof & Tech Services - Instruction			\$852,600
21.300	Purchased Prof & Tech Services - Student Support			\$10,000
22.300	Purchased Prof & Tech Services - Instructional Staff Support			\$318,500
24.300	Purchased Prof & Tech Services - School Administration			\$3,000
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilities			\$0
31.300	Purchased Prof & Tech Services - Food Services			\$0
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)			\$1,184,100
--- PURCHASED PROPERTY SERVICES ---				
26.400	Purchased Property Services			\$5,305
26.441	Rental of Land & Buildings			\$23,870
26.450	Construction and Remodeling			\$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)			\$29,175
--- OTHER PURCHASED SERVICES ---				
27.510	Student Transportation services			\$3,749
24.520	Insurance(other than employee benefits - e.g. D&O)			\$0
45.521	Property Insurance			\$1,339
45.522	Liability Insurance			\$6,186
10.530	Communication(telephone and other)			\$0
21.530	Communication(telephone and other)			\$0
24.530	Communication(telephone and other)			\$18,077
26.530	Communication(telephone and other)			\$0
24.540	Advertising			\$35,750
10.550	Printing and Binding			\$0
21.550	Printing and Binding			\$0
24.550	Printing and Binding			\$0
10.560	Tuition			\$0
21.570	Food Service Management			\$0
21.580	Travel/Per Diem			\$0
24.580	Travel/Per Diem			\$3,348
26.580	Travel/Per Diem			\$0
10.590	Inter-educational, Interagency Purchased Services			\$0

TOTAL - OTHER PURCHASED SERVICES (500)			\$68,448
--- SUPPLIES ---			
10.600	Instructional Supplies		\$3,663
10.641	Textbooks		\$342,265
21.600	Supplies - Student Support Services		\$0
22.644	Library Books		\$1,746
22.650	Periodicals		\$0
24.600	Supplies - School Administration		\$9,157
26.600	Supplies - Operation & Maintenance of Facilities		\$1,308
31.600	Supplies - Food Service		\$0
31.630	Food - Food Service		\$0
TOTAL - ALL SUPPLIES (600)			\$358,139
--- PROPERTY ---			
10.700	Property (Instructional Equipment) - Instruction		\$0
21.700	Property - Student Support Services		\$0
24.700	Property - School Administration		\$0
26.700	Property - Operation & Maintenance of Facilities		\$0
31.700	Property - Food Services		\$0
31.780	Depreciation - Kitchen Equipment Depreciation		\$0
49.710	Land and Improvements		\$0
49.720	Buildings		\$0
27.732	School Buses		\$0
10.733	Furniture and Fixtures - Instruction		\$0
24.733	Furniture and Fixtures - School Administration		\$0
21.733	Furniture and Fixtures - Student Support Services		\$0
10.734	Technology Equipment - Instruction		\$136,485
24.734	Technology Equipment - School Administration		\$1,300
21.734	Technology Equipment - Student Support Services		\$0
27.735	Non-Bus Vehicles		\$0
10.739	Other Equipment - Instruction		\$0
21.739	Other Equipment - Student Support Services		\$0
24.739	Other Equipment - School Administration		\$0
TOTAL - ALL PROPERTY (700)			\$137,785
--- OTHER OBJECTS ---			
10.800	Other Objects- Instruction		\$0
21.800	Other Objects- Student Support		\$0
24.800	Other Objects- School Administration		\$4,890
26.800	Other Objects - Operation & Maintenance of Facilities		\$0
31.800	Other Objects - Food Services		\$0
45.800	Other Objects - Building Acquisition		\$0
	Total - All Other Objects		\$0
10.810	Dues and Fees - Instruction		\$0
21.810	Dues and Fees - Student Support		\$0
24.810	Dues and Fees -School Administration		\$0
26.810	Dues and Fees - Operation & Maintenance of Facilities		\$0
	Total - All Dues and Fees		\$0
TOTAL - OTHER OBJECTS (800)			\$4,890
Total Building Acquisition & Instruction (4500)			
45.830	Interest		\$2,281
45.840	Redemption of Principal		\$51,154
Total other financing sources (uses) and other items			\$53,434

1000	Total Local		\$10,010
3000	Total State		\$2,933,186
4000	Total Federal		\$137,906

TOTAL REVENUES			\$3,081,101
100	Salaries		\$762,166
200	Employee Benefits		\$139,108
300	Purchased Professional and Technical Services		\$1,184,100
400	Purchased Property Services		\$29,175
500	Other Purchased Services		\$68,448
600	Supplies		\$358,139
700	Property		\$137,785
800	Other Objects		\$58,324
TOTAL EXPENDITURES			\$2,737,245
Excess or Deficiency of Revenues over Expenditures			\$343,857
Other Sources of Funding (5000)			\$387,001
Net Asset Balance (Fund Balance)			\$730,858
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)			24%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev = >5%)			11%
Necessary Closure Fund (2 months Purch Prop Serv + Other)			\$14,583

Leadership Academy of Utah		FY21	FY22	FY23	FY24	FY25	FY26	FY27	FY28
Operational Year		Three	Four	Five	Six	Seven	Eight	Nine	Ten
Number of Student		490	490	490	490	490	490	490	490
Revenue									
Child Nutrition Program (CNP) and Lunchroom Sales									
Student Activities		\$10,010	\$10,310	\$10,620	\$10,938	\$11,266	\$11,604	\$11,952	\$12,311
Other		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$10,010	\$10,310	\$10,620	\$10,938	\$11,266	\$11,604	\$11,952	\$12,311
State Educational Funding		\$2,933,186	\$3,017,662	\$3,104,570	\$3,193,982	\$3,285,969	\$3,380,604	\$3,477,966	\$3,578,131
		\$2,933,186	\$3,017,662	\$3,104,570	\$3,193,982	\$3,285,969	\$3,380,604	\$3,477,966	\$3,578,131
Lunch and Breakfast Reimbursement		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Restricted Federal Through State		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Programs for the Disabled (IDEA)		\$71,344	\$72,057	\$72,778	\$73,506	\$74,241	\$74,983	\$75,733	\$76,490
Elementary and Secondary Education Act (ESEA)		\$66,562	\$67,227	\$67,899	\$68,578	\$69,264	\$69,957	\$70,656	\$71,363
		\$137,906	\$139,285	\$140,678	\$142,084	\$143,505	\$144,940	\$146,390	\$147,853
Private Grants & Donations:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Loans:		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prior Year Carryforward		\$387,001	\$730,858	\$1,096,057	\$1,522,614	\$1,962,579	\$2,416,072	\$2,883,181	\$3,363,963
Total other financing sources (uses) and other items		\$387,001	\$730,858	\$1,096,057	\$1,522,614	\$1,962,579	\$2,416,072	\$2,883,181	\$3,363,963
Total Revenue and Other Sources		\$3,468,102	\$3,898,114	\$4,354,924	\$4,869,619	\$5,403,319	\$5,953,221	\$6,519,389	\$7,102,259
Expenditures		Total	Total	Total	Total	Total	Total	Total	Total
--- SALARIES ---									
10.131	Salaries - Teachers	\$229,685	\$233,131	\$236,628	\$240,177	\$243,780	\$247,436	\$251,148	\$254,915
10.132	Salaries - Substitute Teachers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.161	Salaries - Teacher Aides and Paraprofessionals	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.100	Salaries - Other 1000-INSTRUCTION	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total 10 (1000)-INSTRUCTION Salaries (100)	\$229,685	\$233,131	\$236,628	\$240,177	\$243,780	\$247,436	\$251,148	\$254,915
21.141	Salaries - Attendance and Social Work Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.142	Salaries - Guidance Personnel	\$105,966	\$107,556	\$109,169	\$110,807	\$112,469	\$114,156	\$115,868	\$117,606
21.143	Salaries - Health Services Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.144	Salaries - Psychological Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.152	Salaries - Secretarial and Clerical	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.100	Salaries - Other 2100-STUDENT SUPPORT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total 21 (2100)-STUDENT SUPPORT Salaries (100)	\$105,966	\$107,556	\$109,169	\$110,807	\$112,469	\$114,156	\$115,868	\$117,606
22.145	Salaries - Media Personnel - Certified	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.162	Salaries - Media Personnel - Noncertified	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.100	Salaries - Other 2200-INSTRUCTIONAL STAFF SUPPORT	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total 22 (2200)-INSTRUCTIONAL STAFF SUPPORT Salaries (100)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.121	Salaries - Principals and Assistants	\$211,933	\$218,291	\$224,840	\$231,585	\$238,532	\$245,688	\$253,059	\$260,651
24.152	Salaries - Secretarial and Clerical	\$111,265	\$114,603	\$118,041	\$121,582	\$125,229	\$128,986	\$132,856	\$136,842
24.100	Salaries - Other 2400-SCHOOL ADMINISTRATION	\$103,317	\$104,867	\$106,440	\$108,037	\$109,657	\$111,302	\$112,972	\$114,666
	Total 24 (2400)-SCHOOL ADMINISTRATION Salaries (100)	\$426,515	\$437,760	\$449,320	\$461,203	\$473,419	\$485,977	\$498,886	\$512,158
26.100	Salaries - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total 26 (2600)-OPERATION & MAINT OF FACILITIES Salaries (100)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.100	Salaries - FOOD SERVICES	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total 31 (3100)-FOOD SERVICES Salaries (100)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL - ALL SALARIES (100)		\$762,166	\$778,447	\$795,117	\$812,187	\$829,667	\$847,569	\$865,902	\$884,680
--- BENEFITS ---									
10.210	Retirement - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.210	Retirement - Student Support	\$1,060	\$1,076	\$1,092	\$1,108	\$1,125	\$1,142	\$1,159	\$1,176
22.210	Retirement - Instructional Staff Support	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.210	Retirement - School Administration	\$17,061	\$17,316	\$17,576	\$17,840	\$18,107	\$18,379	\$18,655	\$18,935
26.210	Retirement - Operation & Main of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.210	Retirement - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL RETIREMENT	\$18,120	\$18,392	\$18,668	\$18,948	\$19,232	\$19,521	\$19,813	\$20,111
10.220	Social Security/FICA/UNEMP/WCF - Instruction	\$22,969	\$23,313	\$23,663	\$24,018	\$24,378	\$24,744	\$25,115	\$25,492
21.220	Social Security/FICA/UNEMP/WCF - Student Support	\$10,597	\$10,756	\$10,917	\$11,081	\$11,247	\$11,416	\$11,587	\$11,761
26.220	Social Security/FICA/UNEMP/WCF - Operation & Maintenance of Facilities	\$42,651	\$43,291	\$43,941	\$44,600	\$45,269	\$45,948	\$46,637	\$47,337
31.220	Social Security - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL SOCIAL SECURITY/FICA/UNEMP/WCF	\$76,217	\$77,360	\$78,520	\$79,698	\$80,894	\$82,107	\$83,339	\$84,589

10.240	Insurance (Health/Dental/Life) - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.240	Insurance (Health/Dental/Life) - Student Support	\$2,119	\$2,172	\$2,227	\$2,282	\$2,339	\$2,398	\$2,458	\$2,519
24.240	Insurance (Health/Dental/Life) - School Administration	\$42,651	\$43,718	\$48,090	\$52,898	\$58,188	\$64,007	\$70,408	\$77,449
26.240	Insurance (Health/Dental/Life) - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.240	Insurance (Health/Dental/Life) - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL INSURANCE (Health/Dental/Life)	\$44,771	\$45,890	\$50,316	\$55,181	\$60,528	\$66,405	\$72,866	\$79,968
10.200	Other Benefits (specify) - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.200	Other Benefits (specify) - Student Support	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.200	Other Benefits (specify) - School Administration	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26.200	Other Benefits (specify) - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.200	Other Benefits (specify) - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL OTHER BENEFITS (specify)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL ALL BENEFITS (200)	\$139,108	\$141,642	\$147,504	\$153,827	\$160,653	\$168,033	\$176,018	\$184,667
--- PURCHASED PROFESSIONAL & TECHNICAL SERVICES ---									
10.300	Purchased Prof & Tech Services - Instruction	\$852,600	\$877,155	\$902,417	\$928,407	\$955,145	\$982,653	\$1,010,953	\$1,040,069
21.300	Purchased Prof & Tech Services - Student Support	\$10,000	\$10,288	\$10,584	\$10,889	\$11,203	\$11,525	\$11,857	\$12,199
22.300	Purchased Prof & Tech Services - Instructional Staff Support	\$318,500	\$327,673	\$337,110	\$346,819	\$356,807	\$367,083	\$377,655	\$388,531
24.300	Purchased Prof & Tech Services - School Administration	\$3,000	\$3,086	\$3,175	\$3,267	\$3,361	\$3,458	\$3,557	\$3,660
26.300	Purchased Prof & Tech Services - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.300	Purchased Prof & Tech Services - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL PURCHASED PROF & TECH SERVICES (300)	\$1,184,100	\$1,218,202	\$1,253,286	\$1,289,381	\$1,326,615	\$1,364,719	\$1,404,023	\$1,444,459
--- PURCHASED PROPERTY SERVICES ---									
26.400	Purchased Property Services	\$5,305	\$5,457	\$5,614	\$5,776	\$5,942	\$6,114	\$6,290	\$6,471
26.441	Rental of Land & Buildings	\$23,870	\$24,558	\$25,265	\$25,993	\$26,741	\$27,511	\$28,304	\$29,119
26.450	Construction and Remodeling	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL PURCHASED PROPERTY SERVICES (400)	\$29,175	\$30,015	\$30,879	\$31,769	\$32,684	\$33,625	\$34,593	\$35,590
--- OTHER PURCHASED SERVICES ---									
27.510	Student Transportation services	\$3,749	\$3,857	\$3,968	\$4,083	\$4,200	\$4,321	\$4,446	\$4,574
24.520	Insurance (other than employee benefits - e.g. D&O)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
45.521	Property Insurance	\$1,339	\$1,378	\$1,417	\$1,458	\$1,500	\$1,543	\$1,588	\$1,633
45.522	Liability Insurance	\$6,186	\$6,364	\$6,548	\$6,736	\$6,930	\$7,130	\$7,335	\$7,546
10.530	Communication (telephone and other)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.530	Communication (telephone and other)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.530	Communication (telephone and other)	\$18,077	\$18,597	\$19,133	\$19,684	\$20,251	\$20,834	\$21,434	\$22,051
26.530	Communication (telephone and other)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.540	Advertising	\$35,750	\$36,780	\$37,839	\$38,929	\$40,050	\$41,203	\$42,390	\$43,611
10.550	Printing and Binding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.550	Printing and Binding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.550	Printing and Binding	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.560	Tuition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.570	Food Service Management	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.580	Travel/Per Diem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.580	Travel/Per Diem	\$3,348	\$3,444	\$3,543	\$3,645	\$3,750	\$3,858	\$3,969	\$4,084
26.580	Travel/Per Diem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.590	Inter-educational, Interagency Purchased Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - OTHER PURCHASED SERVICES (500)	\$68,448	\$70,420	\$72,448	\$74,534	\$76,681	\$78,889	\$81,161	\$83,399
--- SUPPLIES ---									
10.600	Instructional Supplies	\$3,663	\$3,768	\$3,877	\$3,988	\$4,103	\$4,221	\$4,343	\$4,468
10.641	Textbooks	\$342,265	\$352,122	\$362,263	\$372,697	\$383,430	\$394,473	\$405,834	\$417,522
21.600	Supplies - Student Support Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.644	Library Books	\$1,746	\$1,797	\$1,848	\$1,902	\$1,956	\$2,013	\$2,071	\$2,130
22.650	Periodicals	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.600	Supplies - School Administration	\$9,157	\$9,420	\$9,692	\$9,971	\$10,258	\$10,553	\$10,857	\$11,170
26.600	Supplies - Operation & Maintenance of Facilities	\$1,308	\$1,346	\$1,385	\$1,424	\$1,465	\$1,508	\$1,551	\$1,596
31.600	Supplies - Food Service	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.630	Food - Food Service	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	TOTAL - ALL SUPPLIES (600)	\$358,139	\$368,453	\$379,065	\$389,982	\$401,219	\$412,768	\$424,656	\$436,886
--- PROPERTY ---									
10.700	Property (Instructional Equipment) - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.700	Property - Student Support Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.700	Property - Instructional Staff Support	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.700	Property - School Administration	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26.700	Property - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.700	Property - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

31.780	Depreciation - Kitchen Equipment Depreciation - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
49.710	Land and Improvements	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
49.720	Buildings	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
27.732	School Buses	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.733	Furniture and Fixtures - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.733	Furniture and Fixtures - School Administration	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.733	Furniture and Fixtures - Instructional Support Staff	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.733	Furniture and Fixtures - Student Support Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.734	Technology Equipment - Instruction	\$136,485	\$140,415	\$144,459	\$148,620	\$152,900	\$157,304	\$161,834	\$166,495
24.734	Technology Equipment - School Administration	\$1,300	\$1,337	\$1,376	\$1,416	\$1,456	\$1,498	\$1,541	\$1,586
22.734	Technology Equipment - Instructional Support Staff	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.734	Technology Equipment - Student Support Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
27.735	Non-Bus Vehicles	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.739	Other Equipment - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.739	Other Equipment - School Administration	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.739	Other Equipment - Instructional Support Staff	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.739	Other Equipment - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL - ALL PROPERTY (700)		\$137,785	\$141,753	\$145,835	\$150,035	\$154,356	\$158,802	\$163,375	\$168,081
--- OTHER Objects ---									
10.800	Other Objects- Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.800	Other Objects- Student Support	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.800	Other Objects- Instructional Staff	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.800	Other Objects- School Administration	\$4,890	\$5,030	\$5,175	\$5,324	\$5,478	\$5,635	\$5,798	\$5,965
26.800	Other Objects - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31.800	Other Objects - Food Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.800	Other Objects - Building Acquisition	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Total - All Other Objects	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10.810	Dues and Fees - Instruction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21.810	Dues and Fees - Student Support	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22.810	Dues and Fees - Instructional Staff	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24.810	Dues and Fees -School Administration	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26.810	Dues and Fees - Operation & Maintenance of Facilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL - OTHER Objects (800)		\$4,890	\$5,030	\$5,175	\$5,324	\$5,478	\$5,635	\$5,798	\$5,965
Total Building Acquisition & Instruction (4500)									
830	Interest	\$2,281	\$418	\$0	\$0	\$0	\$0	\$0	\$0
840	Redemption of Principal	\$51,154	\$47,677	\$0	\$0	\$0	\$0	\$0	\$0
Total other financing sources (uses) and other items		\$53,434	\$48,095	\$0	\$0	\$0	\$0	\$0	\$0
1000	Total Local	\$10,010	\$10,310	\$10,620	\$10,938	\$11,266	\$11,604	\$11,952	\$12,311
3000	Total State	\$2,933,186	\$3,017,662	\$3,104,570	\$3,193,982	\$3,285,969	\$3,380,604	\$3,477,966	\$3,578,131
4000	Total Federal	\$137,906	\$139,285	\$140,678	\$142,084	\$143,505	\$144,940	\$146,390	\$147,853
TOTAL REVENUES		\$3,081,101	\$3,167,257	\$3,255,867	\$3,347,004	\$3,440,740	\$3,537,149	\$3,636,308	\$3,738,296
100	Salaries	\$762,166	\$778,447	\$795,117	\$812,187	\$829,667	\$847,569	\$865,902	\$884,680
200	Employee Benefits	\$139,108	\$141,642	\$147,504	\$153,827	\$160,653	\$168,033	\$176,018	\$184,667
300	Purchased Professional and Technical Services	\$1,184,100	\$1,218,202	\$1,253,286	\$1,289,381	\$1,326,515	\$1,364,719	\$1,404,023	\$1,444,459
400	Purchased Property Services	\$29,175	\$30,015	\$30,879	\$31,769	\$32,684	\$33,625	\$34,593	\$35,590
500	Other Purchased Services	\$68,448	\$70,420	\$72,448	\$74,534	\$76,681	\$78,889	\$81,161	\$83,499
600	Supplies	\$358,139	\$368,453	\$379,065	\$389,982	\$401,213	\$412,768	\$424,656	\$436,886
700	Property	\$137,785	\$141,753	\$145,835	\$150,035	\$154,356	\$158,802	\$163,375	\$168,081
800	Other Objects	\$58,324	\$53,126	\$5,175	\$5,324	\$5,478	\$5,635	\$5,798	\$5,965
TOTAL EXPENDITURES		\$2,737,245	\$2,802,057	\$2,829,310	\$2,907,039	\$2,987,247	\$3,070,040	\$3,155,526	\$3,243,825
Excess or Deficiency of Revenues over Expenditures		\$343,857	\$365,199	\$426,557	\$439,965	\$453,493	\$467,109	\$480,782	\$494,471
Other Sources of Funding (5000)		\$387,001	\$730,858	\$1,096,057	\$1,522,614	\$1,962,579	\$2,416,072	\$2,883,181	\$3,363,963
Net Asset Balance (Fund Balance)		\$730,858	\$1,096,057	\$1,522,614	\$1,962,579	\$2,416,072	\$2,883,181	\$3,363,963	\$3,858,434
Reserves as Percentage of Total Revenue (Net Assets / Total Revenue)		24%	35%	47%	59%	70%	82%	93%	103%
Percentage of Funding Contributed to Reserve Balance (Ttl Rev - Ttl Exp / Ttl Rev =>5%)		11%	12%	13%	13%	13%	13%	13%	13%
Necessary Closure Fund (2 months Purch Prop Serv + Other)		\$14,583	\$13,857	\$6,009	\$6,004	\$6,360	\$6,543	\$6,732	\$6,926